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| WI Youth Apprenticeship Logo | Planning and Purchasing  Youth Apprenticeship |

# PLANNING AND PURCHASING

Youth apprentices learn planning and purchasing fundamentals. They provide product and service information, process claims, plan orders, maintain order and receipt schedules, and monitor order status.

**Length of Apprenticeship**: One year. Youth apprentices must have completed Supply Chain Assistant prior to beginning this youth apprenticeship.

# required Competencies

Youth apprentices must become proficient in both general employability and occupation-specific competencies. All of these, and examples of how each can be demonstrated, are found in the following pages. A total of 11 occupational competencies that must be learned for this occupation. Employers may substitute out one of these and should write in the competency they are adding. Youth apprentices must be evaluated on these competencies at least two times each year of their apprenticeship.

|  |
| --- |
| **Competencies** |
| 1. Provide product and service information 2. Process claims 3. Compile customer and order information 4. Plan customer order 5. Process customer sales order 6. Purchase raw materials and services 7. Maintain order and receipt schedules 8. Process supplier invoices 9. Monitor customer order status 10. Compile information for status reports 11. Maintain internal and external relationships |

# Post-Secondary Pathway Opportunities

There are several post-secondary pathway opportunities in this area. The following is a partial list.

* Supply Chain Management
* Supply Management
* Transportation - Logistics

|  |  |
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| WI Youth Apprenticeship Logo | Planning and Purchasing  Youth Apprenticeship  On-the-Job Learning Performance Standards Guide |

# Youth Apprentice information

|  |
| --- |
| Youth Apprentice Name |
| YA Coordinator |
| YA Consortium |
| School District |

# SIGNATURES

The On-the-Job Learning Performance Standards Guide includes a list of competencies youth apprentices learn through mentoring and training at the worksite.

Instructions for the Worksite Employers/Mentors and School-Based or YA coordinators: This document should be reviewed with the employer/mentor, school-based or YA coordinator on a regular basis with the youth apprentice to record progress and plan future steps to ensure completion of the required competencies. Mentors, school-based/YA coordinator, and the apprentice sign below.

**E****mployer/Mentor**

**1st Evaluation (Required) 2nd Evaluation (Required)**

|  |  |
| --- | --- |
| Employer/Mentor Signature | Employer/Mentor Signature |
| Employer/Mentor | Employer/Mentor |
| Business/Company | Business/Company |
| Date Signed | Date Signed |

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

|  |  |
| --- | --- |
| Employer/Mentor Signature | Employer/Mentor Signature |
| Employer/Mentor | Employer/Mentor |
| Business/Company | Business/Company |
| Date Signed | Date Signed |

**School-Based and/or YA Coordinator**

**1st Evaluation (Required) 2nd Evaluation (Required)**

|  |  |
| --- | --- |
| School-Based and/or YA Coordinator Signature | School-Based and/or YA Coordinator Signature |
| School-Based and/or YA Coordinator | School-Based and/or YA Coordinator |
| School District or Organization | School District or Organization |
| Date Signed | Date Signed |

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

|  |  |
| --- | --- |
| School-Based and/or YA Coordinator Signature | School-Based and/or YA Coordinator Signature |
| School-Based and/or YA Coordinator | School-Based and/or YA Coordinator |
| School District or Organization | School District or Organization |
| Date Signed | Date Signed |

**Youth Apprentice**

**1st Evaluation (Required) 2nd Evaluation (Required)**

|  |  |
| --- | --- |
| Youth Apprentice Signature | Youth Apprentice Signature |
| Youth Apprentice | Youth Apprentice |
| School District / High School | School District / High School |
| Date Signed | Date Signed |

**3rd Evaluation (Optional) 4th Evaluation (Optional)**

|  |  |
| --- | --- |
| Youth Apprentice Signature | Youth Apprentice Signature |
| Youth Apprentice | Youth Apprentice |
| School District / High School | School District / High School |
| Date Signed | Date Signed |

# employability Skills (TO BE COMPLETED BY yA EMPLOYER/MENTOR)

All youth apprentices must demonstrate the key employability skills listed below in order to complete the YA program. They do so by earning at least a "Meets Expectation" rating in each. **At least two evaluations are required each year of a youth apprenticeship.** More columns are included below for those who choose to conduct more frequent reviews.

|  |  |
| --- | --- |
| **1** | ***Working to Meet Expectations:*** Needs improvement; requires much assistance and supervision; rarely displays this behavior |
| **2** | ***Meets Expectations:***  Meets entry-level criteria; requires some supervision; often displays this behavior |
| **3** | ***Exceeds Expectations:*** Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior |

|  | **Employability Skills** | **Rating** | | | |
| --- | --- | --- | --- | --- | --- |
| **Competency and Rating Criteria** | | **Year One Evaluation Rating** | | | |
| **Initial** | **Mid Year 1** | **Mid Year 2** | **Final** |
| 1. Develops positive work relationships with others.   *Examples of qualities and habits that the employee might exhibit include . . .*   * Interacts with others with respect and in a non-judgmental manner * Responds to others in an appropriate and non-offensive manner * Helps co-workers and peers accomplish tasks or goals * Applies problem-solving strategies to improve relations with others * When managing others, shows traits such as compassion, listening, coaching, team development, and appreciation | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Communicates effectively with others   *Examples of qualities and habits that the employee might exhibit include . . .*   * Adjusts the communication approach for the target audience, purpose, and situation to maximize impact * Organizes messages/information in a logical and helpful manner * Speaks clearly and writes legibly * Models behaviors to show active listening * Applies what was read to actual practice * Asks appropriate questions for clarity | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Collaborates with others   *Examples of qualities and habits that the employee might exhibit include . . .*   * Works effectively in teams with people of diverse backgrounds regardless of sex, race, ethnicity, nationality, sexuality, religion, political views, and abilities * Shares responsibility for collaborative work and decision making * Uses the problem-solving process to work through differences of opinion in a constructive manner to achieve a reasonable compromise * Avoids contributing to an unproductive group conflict * Shares information and carries out responsibilities in a timely manner | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Maintains composure under pressure   *Examples of qualities and habits that the employee might exhibit include . . .*   * Uses critical thinking to determine the best options or outcomes when faced with a challenging situation * Carries out assigned duties while under pressure * Acts in a respectful, professional, and non-offensive manner while under pressure * Applies stress management techniques to cope under pressure | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Demonstrates integrity   *Examples of qualities and habits that the employee might exhibit include . . .*   * Carries out responsibilities in an ethical, legal and confidential manner * Responds to situations in a timely manner * Takes personal responsibility to correct problems * Models behaviors that demonstrate self-discipline, reliability, and dependability | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Performs quality work   *Examples of qualities and habits that the employee might exhibit include . . .*   * Carries out written and verbal directions accurately * Completes work efficiently and effectively * Performs calculations accurately * Conserves resources, supplies, and materials to minimize costs and environmental impact * Uses equipment, technology, and work strategies to improve workflow * Applies problem-solving strategies to improve productivity * Adheres to worksite regulations and practices * Maintains an organized work area | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Provides quality goods or services (internal and external)   *Examples of qualities and habits that the employee might exhibit include . . .*   * Shows support for the organizational goals and principles by own personal actions * Displays a respectful and professional image to customers * Displays an enthusiastic attitude and desire to take care of customer needs * Seeks out ways to increase customer satisfaction * Produces goods to workplace specifications | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Shows initiative and self-direction   *Examples of qualities and habits that the employee might exhibit include . . .*   * Prioritizes and carries out responsibilities without being told * Responds with enthusiasm and flexibility to handle tasks that need immediate attention * Reflects on any unsatisfactory outcome as an opportunity to learn * Improves personal performance by doing something different or differently * Analyzes how own actions impact the overall organization * Supports own action with sound reasoning and principles * Balances personal activities to minimize interference with work responsibilities | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Adapts to change   *Examples of qualities and habits that the employee might exhibit include . . .*   * Shows flexibility and willingness to learn new skills for various job roles * Uses problem-solving and critical-thinking skills to cope with changing circumstances * Modifies own work behavior based on feedback, unsatisfactory outcomes, efficiency, and effectiveness * Displays a "can do" attitude | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Demonstrates safety and security regulations and practices   *Examples of qualities and habits that the employee might exhibit include . . .*   * Follows personal safety requirements * Maintains a safe work environment * Demonstrates professional role in an emergency * Follows security procedures * Maintains confidentiality | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Applies job-related technology, information, and media   *Examples of qualities and habits that the employee might exhibit include . . .*   * Applies technology effectively in the workplace * Assesses and evaluates information on the job * Assesses training manuals, website, and other media related to the job | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Fulfills training or certification requirements for employment   *Examples of this requirement may include . . .*   * Participation in required career-related training and/or educational programs * Passing certification tests to qualify for licensure and/or certification * Participation in company training or orientation | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| 1. Sets personal goals for improvement   *Examples of this requirement may include . . .*   * Setting goals that are specific and measurable * Setting work-related goals that align with the organization's mission * Identifying strategies to reach goals * Reflecting on goal progress to regularly evaluate and modify goals | | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |

# OCCUPATIONAL Competencies (TO BE COMPLETED BY yA EMPLOYER/MENTOR)

Youth apprentices must earn a rating of at least "MEETS EXPECTATIONS" in each competency by the conclusion of the apprenticeship. A total of 11 competencies, 10 must be from the list below. If necessary, employers can substitute one competency with another occupationally appropriate skill. That skill should be added to the competency list for assessment. **At least two evaluations are required each year of a youth apprenticeship**. More columns are included below for those who choose to conduct more frequent reviews.

|  |  |
| --- | --- |
| **1** | ***Working to Meet Expectations:*** Needs improvement; requires much assistance and supervision; rarely displays this behavior |
| **2** | ***Meets Expectations:***  Meets entry-level criteria; requires some supervision; often displays this behavior |
| **3** | ***Exceeds Expectations:*** Exceeds entry-level criteria; requires minimal supervision; consistently displays this behavior |

| **Occupational Competencies** | **Rating** | | | |
| --- | --- | --- | --- | --- |
| **Competency and Rating Criteria** | **Year 1 Evaluation *Minimum Rating of 2 EACH Check Rating*** | | | |
| **Initial** | **Mid Year 1** | **Mid Year 2** | **Final** |
| Provide product and service information  * contact current or potential customers to market services * distribute product and service information * enter information into the employer database | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Process claims  * work with claimant to assess responsibility * research cause of claim * communicate findings * resolve claims * monitor claims by customer or carrier | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Compile customer and order information  * collect information from records or customer * record order information * verify order information with customer | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Plan customer order  * estimate the size, quantity, time, cost, or materials needed from customer order requirements * review production and logistics documents * arrange for delivery and distribution of supplies and parts * verify production schedules are met | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Process customer sales order  * review order for proper codes, authorizations, etc. * document sales order * enter order | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Purchase raw materials and services  * determine if inventory quantities are sufficient for needs * use re-order points to minimize back-orders * order more materials from qualified suppliers when necessary | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Maintain order and receipt schedules  * compare customer order status with receipt of raw materials * verify receipt of raw materials and distribution to production | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Process supplier invoices  * receive invoice * verify receipt of goods or services * contact suppliers to resolve discrepancies * document and process invoices * forward to appropriate parties for payment | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Monitor customer order status  * respond to customer and supplier inquiries about order status, changes, or cancellations * update records * communicate changes or cancellations in a timely manner to applicable parties | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Compile information for status reports  * monitor in-house inventory movement * complete inventory transfer forms * record production data * compile and prepare documentation * provide documentation and information to account for delays, difficulties, and changes to cost estimates | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Maintain internal and external relationships  * relay information clearly, accurately, and in a timely manner * ensure information is received * resolve discrepancies | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** | **1**  **2**  **3** |
| Competency Substitute (if you replaced a competency above, note the competency and rating) | **1**  **2**  3 | **1**  **2**  3 | **1**  **2**  3 | **1**  **2**  3 |
| **Comments**: | | | | |

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