



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
<ol style="list-style-type: none">1. Provide product and service information2. Process claims3. Compile customer and order information4. Plan customer order5. Process customer sales order6. Purchase raw materials and services7. Maintain order and receipt schedules8. Process supplier invoices9. Monitor customer order status10. Compile information for status reports11. 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



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.

Employer/Mentor

1st Evaluation (Required)

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

2nd Evaluation (Required)

3rd Evaluation (Optional)

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

4th Evaluation (Optional)

School-Based and/or YA Coordinator

1st Evaluation (Required)

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

2nd Evaluation (Required)

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

3rd Evaluation (Optional)

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

4th Evaluation (Optional)

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

Youth Apprentice

1st Evaluation (Required)

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

2nd Evaluation (Required)

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

3rd Evaluation (Optional)

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

4th Evaluation (Optional)

Youth Apprentice Signature
Youth Apprentice
School District / High School
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			
	Year One Evaluation Rating			
	Initial	Mid Year 1	Mid Year 2	Final
1. Develops positive work relationships with others. <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> 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 	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
2. Communicates effectively with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> 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 	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
3. Collaborates with others <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> 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 	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3

Employability Skills		Rating			
Competency and Rating Criteria		Year One Evaluation Rating			
		Initial	Mid Year 1	Mid Year 2	Final
4. Maintains composure under pressure <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
5. Demonstrates integrity <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
6. Performs quality work <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
7. Provides quality goods or services (internal and external) <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3
8. Shows initiative and self-direction <i>Examples of qualities and habits that the employee might exhibit include . . .</i>	<ul style="list-style-type: none"> • 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 	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1	<input type="checkbox"/> 1
		<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2	<input type="checkbox"/> 2
		<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3	<input type="checkbox"/> 3

Employability Skills		Rating			
Competency and Rating Criteria		Year One Evaluation Rating			
		Initial	Mid Year 1	Mid Year 2	Final
9. Adapts to change <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
10. Demonstrates safety and security regulations and practices <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> Follows personal safety requirements Maintains a safe work environment Demonstrates professional role in an emergency Follows security procedures Maintains confidentiality 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
11. Applies job-related technology, information, and media <i>Examples of qualities and habits that the employee might exhibit include . . .</i> <ul style="list-style-type: none"> Applies technology effectively in the workplace Assesses and evaluates information on the job Assesses training manuals, website, and other media related to the job 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
12. Fulfills training or certification requirements for employment <i>Examples of this requirement may include . . .</i> <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
13. Sets personal goals for improvement <i>Examples of this requirement may include . . .</i> <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 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
1. Provide product and service information <ul style="list-style-type: none"> contact current or potential customers to market services distribute product and service information enter information into the employer database 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
2. Process claims <ul style="list-style-type: none"> work with claimant to assess responsibility research cause of claim communicate findings resolve claims monitor claims by customer or carrier 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
3. Compile customer and order information <ul style="list-style-type: none"> collect information from records or customer record order information verify order information with customer 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
4. Plan customer order <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3

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
5. Process customer sales order <ul style="list-style-type: none"> review order for proper codes, authorizations, etc. document sales order enter order 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
6. Purchase raw materials and services <ul style="list-style-type: none"> determine if inventory quantities are sufficient for needs use re-order points to minimize back-orders order more materials from qualified suppliers when necessary 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
7. Maintain order and receipt schedules <ul style="list-style-type: none"> compare customer order status with receipt of raw materials verify receipt of raw materials and distribution to production 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
8. Process supplier invoices <ul style="list-style-type: none"> receive invoice verify receipt of goods or services contact suppliers to resolve discrepancies document and process invoices forward to appropriate parties for payment 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
9. Monitor customer order status <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
10. Compile information for status reports <ul style="list-style-type: none"> 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 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
11. Maintain internal and external relationships <ul style="list-style-type: none"> relay information clearly, accurately, and in a timely manner ensure information is received resolve discrepancies 		<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3

