



Work Based Learning Logistical Planning Checklist

This checklist ensures that all necessary supports, resources, and logistics are in place prior to a student's participation in a WBLE. Use this to guide planning meetings and coordination with families, schools, VR staff, and community partners.

Phase 1: Pre-Placement (General Preparation Before a Site is Identified)

To be reviewed and completed by the Vocational Rehabilitation Counselor (VRC) and the student (customer). May include input from school staff, family, and transition team.

Task	Complete	Not Needed	In Progress	Notes
Student has received benefits counseling (SSI/SSDI, ABLE accounts, income impact)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Family/guardian understands potential impact of earned income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Referral to a Work Incentives Counselor (if applicable) has been made	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Preliminary interest inventory and WBLE readiness checklist completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Travel training or transportation planning has been introduced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Preliminary discussions with family/guardian about transportation, goals, and availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Discussion of potential workplace accommodations and support needs (communication, sensory, mobility)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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Identification of clothing, supplies, or equipment that may be needed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
IPE has been updated to reflect WBLE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Consent forms or releases for WBLE have been signed and received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Phase 2: Upon Site Identification (Once a Specific Worksite Is Chosen)

To be completed collaboratively by the VRC, Community Rehabilitation Provider (CRP), and student. Family and school staff may also provide input.

Task	Complete	Not Needed	In Progress	Notes
Employer has been informed of supports (job coach, accommodations)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job duties and expectations are reviewed with student and family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Site visit or tour scheduled for student	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job coach or site trainer has been assigned and scheduled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Specific transportation plan developed for the identified worksite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Work attire or uniform requirements reviewed; student has necessary clothing/shoes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tools, devices, or assistive technology are ready and tested (e.g., AAC, noise-canceling headphones)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency contacts shared with worksite supervisor and job coach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Orientation scheduled (e.g., site rules, break areas, safety procedures)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payment details clarified: is student paid by <input type="checkbox"/> Employer <input type="checkbox"/> OVR <input type="checkbox"/> OJT?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Payment method explained (check, direct deposit, card); banking needs addressed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Phase 3: Post-Placement (Student is Actively Participating at the Site)

To be monitored by the CRP and VRC in collaboration with the student, employer, and job coach.

Task	Yes	No	Notes
Regular check-ins scheduled with student, coach, and employer	<input type="checkbox"/>	<input type="checkbox"/>	
Communication method confirmed (logbook, phone call, email)	<input type="checkbox"/>	<input type="checkbox"/>	
Job coach or trainer providing on-site support as needed	<input type="checkbox"/>	<input type="checkbox"/>	
Student is following safety procedures and emergency protocols	<input type="checkbox"/>	<input type="checkbox"/>	
Student is expressing how the placement is going (likes, challenges, support needs)	<input type="checkbox"/>	<input type="checkbox"/>	
Adjustments to accommodations/supports made as needed	<input type="checkbox"/>	<input type="checkbox"/>	
Issues or concerns from employer addressed promptly	<input type="checkbox"/>	<input type="checkbox"/>	
Student is building independence in tasks or routines	<input type="checkbox"/>	<input type="checkbox"/>	
Student has been asked about future WBLE or employment interest	<input type="checkbox"/>	<input type="checkbox"/>	

Progress documented in IEP, IPE, or transition plan updates	<input type="checkbox"/>	<input type="checkbox"/>	
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Phase 4: Post-Experience (Once the Work Experience is Completed)

To be reviewed by the VRC, student, CRP, and family as part of reflection and planning for next steps.

Task	Yes	No	Notes
Student participated in a debrief or reflection conversation	<input type="checkbox"/>	<input type="checkbox"/>	
Feedback gathered from job coach, employer, and student	<input type="checkbox"/>	<input type="checkbox"/>	
Lessons learned or successful strategies documented	<input type="checkbox"/>	<input type="checkbox"/>	
Challenges identified and used to inform future planning	<input type="checkbox"/>	<input type="checkbox"/>	
Work-based experience formally closed out in IPE/IEP	<input type="checkbox"/>	<input type="checkbox"/>	
Resume or portfolio updated with completed work experience	<input type="checkbox"/>	<input type="checkbox"/>	
Next steps planned (e.g., new WBLE, paid job, vocational training)	<input type="checkbox"/>	<input type="checkbox"/>	
Student and family supported in celebrating success	<input type="checkbox"/>	<input type="checkbox"/>	