



Workplace experience planning checklist

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Note: Throughout this document we talk about ‘institutions’ which refers to schools, colleges and specialist institutions providing education to young people.

Pre-visit planning and logistics

- ☐ Establish a key point of contact within your organisation for the institution (if a group activity) or young person (if 1:1 self-organised).
- ☐ Agree how many young people your business can accommodate and what age/year group.
- ☐ Consider how you can proactively target this opportunity to young people facing barriers.
- ☐ Have a clear purpose for the experience which can be shared with the institution and the young people. Arrange a meeting to discuss your plan and agree the aims. Are there specific learning outcomes that the institution or young people are looking to achieve? (Tip: educators are incorporating the new equalex model into their careers education programmes so can advise how the activity you are offering helps meet the specific needs of the young person/people. You can see some example learning outcomes at the end of this document).
- ☐ Agree the details in writing – including time, date, location, number of young people.
- ☐ Ask about any additional needs you may need to be aware of, or other specific information to support the young people to get the most out of the activity. For some young people, particularly those with Special Education Needs and Disabilities, a pre-visit by the education staff may enable a better understanding of what will be expected from the learners and help agree appropriate activities.
- ☐ Ask the institution if they need you to complete any documents in advance or to share your liability insurance policy or risk assessment.
- ☐ Discuss the institution’s behavioural policies so that you can mirror this familiar language in your health and safety briefing to the young people.
- ☐ Discuss timings and logistics for the day e.g. parking, equipment, space, layout, and room setup. Will lunch/refreshments be provided by you or the institution? Can you support with travel arrangements/ or costs. What spaces are available to accommodate accessibility/ and meet any additional needs?
- ☐ Obtain consent for photo permission/case studies if necessary.
- ☐ Obtain any PPE required (e.g. if smaller sizes may be needed).
- ☐ Consider how you will capture feedback (see ‘post-visit’ for more ideas).



Pre-visit content planning

- ☐ Write an outline of the day, including timings, that can be shared in advance to prepare young people for what to expect.
- ☐ Consider sharing a pre-visit task, or at the least a summary about your organisation that learners can familiarise themselves with.
- ☐ Young people will find it useful to know more about the people they will be meeting. Invite the employees who'll lead, or be involved, in the day to complete an [Employer host – vocational profile](#) and share this in advance or at the start of the visit.
- ☐ Plan a tour of the workplace so the learner/s can meet and ask questions to people from across the business (try to include a range of career stages, entry routes and representing a diverse and relatable mix of backgrounds). It can be helpful to share some sample questions to support initial engagement.
- ☐ Start the visit with a trigger or a hook. Engage the learners from the very start of the session. (Learners will be excited but may not be very forthcoming at first. What fact or story would impress or inspire the learners about you, the organisation or its products or services?)
- ☐ Consider how you can incorporate extensive two-way interactions throughout the day with all young people. Can you build in an opportunity for learners to get practical with your products or services? Can you show how different departments interact?
- ☐ Consider any specific learner needs and how you can accommodate these. For example, some learners might require a slower, more practical demonstration or explanation. Could you, or one of your colleagues, deliver this separately?
- ☐ Highlight skills used in the workplace and different entry routes into the business. Be sure to talk about the future of your sector and changing roles, requirements and entry pathways.
- ☐ Set learners a workplace challenge (team or individual) that will keep them engaged and will meet learning outcomes. (Ideally discuss this with the institution in your pre meet to ensure suitability/ and accessibility for all young people)
 - › What is the context of the challenge? (Why this challenge relates to you work).
 - › Ensure that the challenge can be completed by participants.
 - › What resources may you need? Do you need laptop, pens, notebooks or support from anyone else?
 - › Allow all young people to present their work and give them feedback.
 - › Build in time for questions and answers. Invite these from learners and teachers.
- ☐ Run through the final session plan with another colleague if possible (perhaps one early in their career). Try to put yourself in the young people's shoes. How could you make the session be most engaging and informative?
- ☐ Discuss with the institution how to ensure that young people can reflect on the insights, knowledge and skills gained after the activity.
- ☐ Remember, this encounter could potentially change a young person's life outcomes. It could send them on a pathway that they have never considered before – one that helps them realise their potential.



On the day

- ☐ Learners will relish being treated as potential employees and given responsibility. Tell them you will be looking out for good employability skills (e.g. [the Skills Builder essential skills](#)) throughout the visit and provide feedback regularly.
- ☐ Don't be scared to be serious during health and safety talks and be clear on your expectations of behaviour and attitude (as outlined in the pre-visit planning section, it's good to mirror the language in the institution's behavioural policy as this will be familiar).
- ☐ Check learning throughout the visit with quick Q&A or a quiz. (True/false works well).

Post-visit

- ☐ Seek feedback from teachers, learners and, if possible, parents and carers, as well as any volunteers from your organisation who were involved. What can be done during the session vs after? Will it be on paper or completed electronically? Ensure all young people are part of the feedback in some form to ensure the visit has been meaningful for all. You can download our short [teacher](#), [learner](#) and employee [volunteer](#) feedback survey examples to help consider the questions you may want to ask.
- ☐ Reflect on the session, including the feedback received. Review how it met the needs identified in your planning stages (both yours, and the young peoples' and any learning outcomes shared by the institution). Consider how you build on the successes and areas for improvement.
- ☐ Speak with the Careers Leader or key point of contact to thank them for the opportunity and discuss ways to strengthen the partnership in the future.

For individual or small group in-person workplace experiences you can help to make it more inclusive by:

- ☐ Inviting the young person/people into your workplace (or online) for an informal coffee or chat prior to the experience starting
 - › provide an outline of likely tasks and role – ask them to let you know whether there are any aspects where they are likely to require additional support
 - › find out their communication preferences and anything else they would like to share about how they can get the most out of the experience (the Vocational Profile template suggested on the previous page can help with this)
 - › note any sensory information which the work environment could affect
- ☐ Assigning a relatable workplace buddy / 1-1 point of contact.
- ☐ Sharing all key information with the young person in advance, such as timings of day, key contacts, breaks and lunch details (including any costs), appropriate clothing, where to go when they first arrive - you may also consider how you could share a video in advance to allow them to familiarise themselves with layout and key people
- ☐ Being flexible about start and finish times (if possible, typically for experiences longer than one day)
- ☐ Making reasonable adjustments, such as where the work experience takes place (e.g. if hybrid may be possible for some roles)
- ☐ Providing travel information about how to get to your workplace and any costs





High level equalex learning outcomes are shown in the outer ring

(schools will be working with a more detailed list of objectives which sit under these outcomes)



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