Planning and documentation are critical to Experiential Learning success. To reduce risk, plan your project thoughtfully and communicate expectations clearly among all participants.

We have developed a Forms Guide to help you determine the documentation you need to establish and clarify relationships and responsibilities with partner organizations outside the university. The documentation required depends on the level of your students’ engagement with an outside organization. Use the following guide to access the correct forms.

**Forms Guide**

**If your department already has forms and procedures in place that cover all the issues addressed in the forms and templates, you may continue to use your departmental forms and procedures.**

**Level 1**
Student acts as an entry-level or one-time/occasional volunteer or intern.
- The student has an introductory experience with an issue, area, agency, and/or neighborhood.
- Service placements are short-term.
- The project assignments involve exploration, training, coaching, and guidance.
- Typical activities may include physical labor, tutoring or educational support, providing services or administrative assistance for an agency.

Checklists & Forms: Level 1 Checklist | Student Learning Plan, Short Form | Waiver of Liability

**Level 2**
Student acts as an on-going volunteer or intern.
- The student works with a particular issue, area, agency, and/or neighborhood for a period of time, deepening their engagement.
- The student acts as a professional within the workplace setting with a pre-determined schedule. He or she may want/need direction, but has the opportunity to take initiative. The project(s) may be less or more complex, but involve consistent engagement over a period of time.
- Activities may include organizational and project planning work.
- Typical activities may be direct service roles defined for one semester, e.g., tutoring the same child, or may involve a project or initiative, e.g., working on a team to create HIV/AIDS training for high school students.

Checklists & Forms: Level 2 Checklist | Student Learning Plan, Long Form | Waiver of Liability

**Level 3**
Student acts as a site/project coordinator or intern.
- The student acts as a coordinator for a project and/or site, organizing the efforts of other student or non-student volunteers.
- Typically, the student has risen into this position by working as an occasional and/or regular volunteer (Level 1 or Level 2).
- Special training may be required for this role.
- Activities may include recruiting, planning, and managing projects or programs.

Checklists & Forms: Level 3 Checklist | Student Learning Plan, Long Form | Waiver of Liability | Partner Organization Evaluation
Student Travel Profile (if applicable)

**Level 4**
Student acts as a pre-professional intern or fellow (professional or graduate student practicum)
- The experienced/qualified student holds positions involving direct client service, program management or implementation, research, program design, and planning.
- The student may play a role in longer-range strategic planning for the agency itself or some of its key initiatives.
- Student has significant responsibilities, often in conjunction with other staff or a planning team.

Checklists & Forms: Please contact Brian Donohue (donohue@berkeley.edu) of Business Contracts to develop an appropriate plan.

**QUESTIONS** regarding this information may be directed to:
Suzan Akin, Program Manager at the Cal Corps Public Service Center, 510-643-0307, suzanakin@berkeley.edu