

COMPETENCIES FOR MANAGERS OF VOLUNTEERS

Training and Development

Overview and Novice to Expert Continuum



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Competencies for Managers of Volunteers

D. Training and Development – Apply the principles of adult learning to assess needs, evaluate results, design, facilitate and deliver programs, promote professional development, encourage lifelong learning and contract and manage training events.	
Function	Description
1. Learn and apply principles of adult learning.	Understand and apply the knowledge that adult learners learn by doing, building on their experience. Adult learners need a reason to participate and expect training to be interactive, relevant, practical, reflective, and self-directed.
2. Assess training needs.	Diagnose individual and contextual needs based in part on work performance; distinguish training needs from structural, organizational or individual needs; develop learning objectives.
3. Evaluate training.	Assess process and outcomes of training. Evaluate training and experience gained. Analyze data to determine changes in knowledge and behavior and to adjust training methods.
4. Design training events and instructional materials.	Connect objectives to outcomes and instructional methods; use a variety of instructional approaches and instructional materials that enhance immediate and long-term learning, application, and reflection.
5. Facilitate and deliver training.	Deliver effective training using a range of interactive approaches; incorporate an understanding of group dynamics and adult learning principles; build the capacity for lifelong learning.
6. Coach and mentor others.	Empower others through peer instruction, informal work-based training, “teachable moments,” self-reflection, and timely, useful feedback.
7. Contract and manage training events.	Create a training and development infrastructure; manage planning, logistics and budget for training events.

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D. TRAINING AND DEVELOPMENT

Topic	D. 1. Learn and apply principles of adult learning
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<input type="checkbox"/> Know and use adult learning principles <input type="checkbox"/> Honor the learner’s need for learning to be relevant and practical <input type="checkbox"/> Emphasize learning by doing <input type="checkbox"/> Respect the learner’s experience
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<input type="checkbox"/> Develop learning objectives that emphasize changes in knowledge or performance <input type="checkbox"/> Create a learning environment that encourages participation <input type="checkbox"/> Emphasize participant’s experience and prior knowledge <input type="checkbox"/> Use an interactive approach to learner involvement
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<input type="checkbox"/> Apply experiential learning model in different learning environments <input type="checkbox"/> Shift from teacher directed to learner focused approach <input type="checkbox"/> Engage learners by incorporating their knowledge and experience
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<input type="checkbox"/> Facilitate training with a wide range of strategies <input type="checkbox"/> Assure interaction with and among learners <input type="checkbox"/> Change focus in response to participant’s feedback <input type="checkbox"/> Demonstrate flexibility by adapting instructional approach to reflect the audience and the setting.

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Topic	D. 2. Assess training needs
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Survey participants informally for experience with and knowledge of topic <input type="checkbox"/> Identify and use various assessment tools <input type="checkbox"/> Recognize need for customer response survey <input type="checkbox"/> Makes minor adjustments to program/curriculum to reflect participant needs
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Select methodology consistent with needs <input type="checkbox"/> Design & distribute survey of training needs, interests, and performance problems <input type="checkbox"/> Translate results into learning objectives <input type="checkbox"/> Link learning objectives with individual, organizational, and program goals <input type="checkbox"/> Identify expected performance indicators as a basis for evaluation
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Identify sources of performance problems to distinguish training needs from needs requiring adjustments in supervision, structure, process, procedures, or policy. <input type="checkbox"/> Adapt training plan to reflect training needs and audience <input type="checkbox"/> Incorporate recommendations from learners and peers on training design and content
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Recognize influence of context on needs <input type="checkbox"/> Recommend alternative interventions to training, when appropriate, such as peer mentoring and coaching <input type="checkbox"/> Assess application of knowledge in workplace <input type="checkbox"/> Understand organizational development needs <input type="checkbox"/> Apply organizational development methods

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Topic	D. 3. Evaluate training
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Design & administer simple training response survey <input type="checkbox"/> Analyze results <input type="checkbox"/> Seek assistance from expert to design evaluation
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Use needs or performance problems as basis for evaluation & identify method to assess gain <input type="checkbox"/> Create and analyze training evaluation <input type="checkbox"/> Analyze results for trends and potential changes to training approach
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Recognize differences between evaluation & research <input type="checkbox"/> Use evaluation to assess knowledge gain <input type="checkbox"/> Able to analyze results of evaluations & prepare a report <input type="checkbox"/> Use appropriate evaluation design that distinguishes differences among outputs, outcomes and outcomes.
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Design evaluation tools to assess outcomes and impact <input type="checkbox"/> Understand & use qualitative methods – e.g., surveys, narratives, case studies, learning histories, etc. <input type="checkbox"/> Design evaluations that are replicable and reportable in relevant publications.

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Topic	D.4. Design training events & instructional materials
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Follow prepared curriculum and materials <input type="checkbox"/> Focus on imparting information & covering prepared material
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Expand repertoire of instructional methods by increasing use of more interactive approaches <input type="checkbox"/> Link methods to learning objectives <input type="checkbox"/> Identify and engage partners or collaborators to assist with planning and organizing. <input type="checkbox"/> Create materials to enhance learning
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Adapt curriculum to suit audience <input type="checkbox"/> Incorporate self-directed and peer learning activities and interactive approaches <input type="checkbox"/> Design instructional materials to support achievement of learning objectives
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Use a variety of media & methods to deliver training <input type="checkbox"/> Respond and adapt to unique and evolving needs of audience <input type="checkbox"/> Create comprehensive curriculum or learning interventions that meet training objectives & learner needs

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Topic	D. 5. Facilitate and deliver training
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Know group dynamics <input type="checkbox"/> Know basics of meeting management <input type="checkbox"/> Demonstrate basic presentation skills (appearance, voice, eye contact, etc.)
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Apply best practices in training design & meeting management <input type="checkbox"/> Gather feedback during training to ensure that training methods are effective in meeting learning objectives <input type="checkbox"/> Encourage & achieve participation by learners or group members
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Encourage audience to articulate learning goals & then incorporate them into program <input type="checkbox"/> Build capacity of learner to take responsibility for lifelong learning
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Read the audience & adjust instructional approach as a result <input type="checkbox"/> Manage challenging behaviors & use them as a learning opportunity <input type="checkbox"/> Facilitate opportunities for learner self-reflection

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Topic	D. 6. Coach and mentor
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<input type="checkbox"/> Provide positive and negative feedback based on person’s performance <input type="checkbox"/> Demonstrate confidence in subject matter <input type="checkbox"/> Explain content to learner <input type="checkbox"/> Provides learner with practice opportunities
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<input type="checkbox"/> Build relationships and networks with other people <input type="checkbox"/> Conduct “on-the-job” training & technical assistance <input type="checkbox"/> Empower others to apply skills & knowledge in their own settings <input type="checkbox"/> Build confidence in learner
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<input type="checkbox"/> Take advantage of teachable moments <input type="checkbox"/> Acknowledge & incorporate the assets of learner <input type="checkbox"/> Encourage learner self-assessment & reflection <input type="checkbox"/> Focus on personal growth & professional development of learner as a long term process <input type="checkbox"/> Coach learner in goal setting & action planning <input type="checkbox"/> Encourage learner to become independent
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<input type="checkbox"/> Understand learner’s experience within the larger context of the learner’s work <input type="checkbox"/> Create a collaborative environment for shared problem solving <input type="checkbox"/> Empower learner to engage in lifelong learning

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Topic	D. 7. Contract and manage training events.
Skill Level	Indicators
<p><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Understand organization policies &/or laws regulating contracting for training sites & services <input type="checkbox"/> Understand in-kind contributions <input type="checkbox"/> Know the financial sources of program support <input type="checkbox"/> Identify & arrange training logistics (site, food, reproduction) <input type="checkbox"/> Manage training event (announcement, registration, agenda, attendance) <input type="checkbox"/> Document & monitor expenditures against a training budget
<p><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Apply policies &/or laws regulating contracting for training sites & services <input type="checkbox"/> Develop a rudimentary budget based on training goals & activities <input type="checkbox"/> Know essential cost elements of conducting training <input type="checkbox"/> Identify & apply criteria for selecting training consultants/contractors <input type="checkbox"/> Develop a performance-based contract that specifies activities & deliverables
<p><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Analyze trends of budget & expenditures <input type="checkbox"/> Adapt spending patterns to reflect budgetary realities <input type="checkbox"/> Identify & obtain alternate sources of funding <input type="checkbox"/> Develop a comprehensive budget in compliance with official guidelines <input type="checkbox"/> Develop or adapt guidelines & policies for managing income & expenditures
<p><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Advocate for adequate funding to support continued viability of training program <input type="checkbox"/> Justify the value added of the training required to maintain program quality <input type="checkbox"/> Pursue financial sustainability