

# National Committee for Employer Support of the Guard and Reserve INSTRUCTION

NUMBER 1250.12  
October 1, 2008

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Training

SUBJECT: Volunteer Training

- References:
- (a) NCESGR Instruction 1250.11, "Field Committee Training Coordinator," March 15, 2006 (hereby cancelled)
  - (b) NCESGR Instruction 1250.02, "Field Committee Structure," October 1, 2008
  - (c) NCESGR Instruction 1250.05, "Subcommittee Management," October 1, 2008
  - (d) ESGR FY09-13 Strategic Plan, October 1, 2008
  - (e) NCESGR Instruction 1250.10, "Volunteer Management," October 1, 2008

1. PURPOSE. This Instruction:

a. Replaces NCESGRI 1250.11 (Reference (a)). NCESGR I 1250.02, NCESGRI 1250.05, ESGR FY09-13 Strategic Plan, and NCESGRI 1250.10 (References (b) through (e)) and Enclosures 1 through 22 support this Instruction.

b. Establishes and standardizes Employer Support of the Guard and Reserve (ESGR) Committee volunteer training management under the leadership of the Field Committee(s) (FC) Chair and Committee Training Director(s) (CTD).

c. Serves as a guide for FC Chairs, CTD and other training volunteers.

2. APPLICABILITY. This Instruction applies to ESGR FC.

3. POLICY.

a. The National Committee for Employer Support of the Guard and Reserve (NCESGR) shall have a national training program and a Training Director. Each FC will have a training plan and a CTD.

b. The training program at the NCESGR level shall consist of training strategy guidance, a planning calendar, job descriptions, and training material for each course.

c. The training plan at FC level shall consist of a training strategy and planning calendar with a supporting budget.

4. RESPONSIBILITIES. See Enclosure 1.

5. PROCEDURES. See Enclosure 2.

6. TRAINING MANAGEMENT OPERATING AND IMPLEMENTING PROCEDURES.

Training management is the process used by ESGR leaders to identify training requirements and subsequently plan, resource, execute, and evaluate training.

7. TRAINING LINKAGE TO STRATEGIC PLAN. Volunteer Training shall support the goals and objectives as stated in the ESGR Strategic Plan (Reference (d) and Enclosure 3).

8. TRAINING PLANNING PROCESS.

a. Training Planning links essential tasks with preparation, execution, and evaluation of training.

b. Training Plans. There are three types of Training Plans:

(1) Long-Range Plan: NCESGR has the responsibility to develop the Long-Range plan and calendar covering 3-5 years. Each FC shall publish a long-range plan in the form of a 2-year calendar.

(2) Short-Range Plan: The NCESGR and FC Annual Operational/Business Plans refine the long-range plans and calendars, looking out from 1-2 years, with the first year fixed, and the second year projected. The FC plan, submitted to NCESGR each year, includes a 1-year calendar and budget requirements.

(3) Near-Term Plan: The Action Plan for NCESGR Staff and FC and Areas/Regions within the FC (Enclosure 4). Near-Term Planning is the final phase in the overall training planning process that links preparation for training to execution and evaluation. Near-Term plans cover no more than 3 months and include:

(a) Review the training objective(s); ascertain the number of volunteers to be trained, resources, and training environment needed to perform the training.

(b) Finalize training plans by determining the best sequence of training tasks, issuing guidance, and preparing the final agenda/schedule.

(c) Prepare for volunteer training by preparing the trainer, evaluators, and support personnel, preparing the volunteers for training, and preparing the resources for training.

(d) Communicate the plan including training objectives, importance of the training, volunteers to be trained, trainer's position and name, coordinating instructions, safety considerations, training resources required, time and place, necessary references, recommended training methods, and any special considerations such as rehearsals and evaluation with the FC Executive Staff, CTD and trainers, and all FC members.

9. FC ASSESSMENT.

a. FC shall conduct an assessment of their current individual volunteer training requirements to begin the training planning and requirements validation process (Enclosure 5).

b. The FC Chair's assessment provides direction and focus to the volunteer training planning process. FC Chairs apply two principal inputs at the start of the planning process – the FC mission goals and objectives, and individual volunteer training assessment. FC Chairs identify the training tasks that support the mission. The individual volunteer training assessment rates the organization's current level of training proficiency with the desired level of functional area proficiency. This ensures process results for all volunteer training meets or exceeds functional area requirements and maintains efficiency of the training program.

c. The FC Chair and CTD assess the status of the volunteer training in light of the following sources, and then determine which volunteers and functional areas should be trained to realize success:

- (1) Review NCESGR training requirements.
- (2) Conduct an assessment of the FC's volunteer staff training proficiency.
- (3) Observe volunteers' performance.
- (4) Solicit input from FC leaders.
- (5) Solicit input from volunteers.
- (6) Solicit input from Regional Deputy Director.
- (7) Review past individual volunteer training.
- (8) Review past FC training events and assess results.
- (9) Conduct a training meeting with volunteers to discuss training effectiveness.
- (10) Review Committee volunteer training records.

10. TRAINING REQUIREMENTS. Training requirements are the difference between demonstrated, measurable, or observable performance and the prescribed standard of proficiency. They are identified after the FC Chair's assessment, and before the formulation of training guidance, and form the basis for determining training priorities (Enclosure 6).

11. TRAINING PRIORITIES. Training priorities reflect what is most important to the organization and may change as the direction of the organization changes. They shall be managed in the order of importance as determined by NCESGR and FC leadership (Enclosure 7).

12. TRAINING STRATEGY.

a. FC Training Strategy shall reflect the 'Ends' (actions to achieve desired results including effective training measurements), 'Ways' (training tasks, audience, objectives, events, frequency,

retraining to accomplish the results), and ‘Means’ (funds, staff, time, travel costs, facilities, materials, resources) to achieve the stated training objectives (Enclosure 8).

b. The FC Chair’s assessment provides a logical start point for describing the training strategy “Ends.” Training Strategy links the FC Chair’s training assessment with training guidance in the training planning process. The Training Strategy defines the “Ends,” outlines the “Ways,” and allocates the “Means.” The Training Strategy does not specify ‘how’ to train volunteers. The FC Chair, CTD, and Committee Leaders decide ‘how’ to train volunteers.

c. Metrics: NCESGR and FC Training Strategies shall include effective training measurements to assess the proficiency and effectiveness of its volunteers; i.e. Ombudsmen, Employer Outreach, Military Outreach, etc. Measurements should not only assess the number of new volunteers trained or current volunteers provided recurrent training but to include effective training measures that assess the volunteer’s job performance on an annual basis. Throughout the Volunteer Training Program, specific training areas will be evaluated for their application in the volunteer setting, NCESGR and FC Strategic Planning business impact, and Return on Investment (ROI).

### 13. ANNUAL VOLUNTEER TRAINING PLAN.

a. NCESGR will provide annual training guidance for FC in conjunction with the Strategic Plan annual update. This annual training guidance will be issued in the form of an NCESGR Operational Memo, approved and signed by the Executive Director.

b. FC will complete their annual training plans with a training budget and a planning calendar to be submitted concurrently with the Annual Business Plan by May 31 each year. It will include Chair Training Guidance, consisting of FC Chair’s intent, mission goals, evaluation methods, metrics, training goals and supporting objectives, training priorities, training strategy, a training-planning calendar, and a training budget.

c. At the FC level, training planning is a relatively centralized process. Most training will be planned by the CTD with the assistance of Area Volunteer Trainers. The Area Volunteer Trainer may plan and conduct training for the volunteers depending on the Committee Chair’s needs and desires.

d. FC Training Budget. Each FC will develop a Committee training budget and forecast their volunteer training requirements. The budget will be submitted as part of the Annual Business Plan (Enclosure 9). The procedure to develop the training budget follows:

- (1) Prioritize your training needs.
- (2) Develop a standard needs assessment.
- (3) Place numbers by each subject or task.
- (4) Enter dollar estimates for each training subject or task.
- (5) Include travel, per diem, and lodging.

- (6) Calculate totals.
- (7) Match allocated budget to prioritized needs.
- (8) Distribute budget allocation.
- (9) Use as documentation for future budget development.

14. STANDARDIZATION AND EVALUATION METHODS.

- a. FC shall evaluate all volunteer training for standardization and effectiveness.
- b. All volunteer training programs, practices, and operations procedures (for example: lesson plans, materials, scenarios, techniques, etc. this list is not all-inclusive) will be standardized with evaluation methods as much as practical.
- c. Evaluation may be conducted by subjective evaluation which is normally based upon the judgment of the Volunteer Trainer or objectively using a measurable, observable or prescribed standard. Evaluation standards and performance measures are included with each Volunteer Job Description and Training Objective. The FC Chair should decide which evaluation method is preferred for the training being conducted.

15. FC METRICS. FC shall use the training metrics in Enclosure 10 so that training can be both evaluated and then assessed to measure progress/performance/status in meeting established planning objectives. Each FC may add additional metrics as it deems appropriate.

16. TRAINING ASSESSMENT.

- a. Training evaluations measure performance levels and are a critical component of any training assessment as regards to the demonstrated ability of the volunteer to perform the assigned task/action against a prescribed standard. Evaluation of training is not a test; it is used to inform the trainer and the participant whether or not they have achieved the prescribed standard, to aid in identifying any retraining requirements, and to assist FC leaders in constructing their training assessment.
- b. Evaluations of training are usually informal and internal. They take place whenever a trainer conducts training for his/her volunteers and observes or measures their performance. These evaluations are planned and conducted by FC leadership as an integral part of the training. They are simple, straightforward, and result in a clear measure of the volunteers' training proficiency.
- c. Organizational Assessment. Assessment is the FC Chair's responsibility and reflects the FC's judgment of the organization's ability to accomplish the ESGR mission. Assessment is a continuous process which includes evaluating training, conducting an organizational assessment, and preparing a training assessment. The FC Chair uses his/her experience and feedback from training evaluations as well as customer feedback to make an assessment. Organizational assessment encompasses a wide variety of inputs; however, the evaluation of training is a major component of the assessment. Training objectives are stated not only in terms of learning, but

also what the volunteer is expected to do in the volunteer setting and the impact they should have on the FC Strategic Plans business performance, expressed in measurable terms. Volunteers should understand what is expected from them as a result of each ESGR program, even before they participate. They shall be expected to be held accountable for learning and for applying what they learn. The FC Chair should consider various ways of gathering and analyzing the evaluation data and observations in order to develop a snapshot of the effectiveness of their volunteers within the organization's major functional areas (Reference (b)).

17. RELEASABILITY. UNLIMITED. This Instruction is approved for public release. Copies may be obtained through the Internet from the ESGR Web site at <https://www.esgmet.com/Library/library.asp?area=ESGRInstructions>.

18. EFFECTIVE DATE. This Instruction is effective immediately.



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#### Enclosures

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  2. Procedures
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  5. Field Committee Chair Committee Operations Volunteer Training Assessment
  6. NCESGR and Field Committee Training Requirements
  7. Training Priorities, NCESGR and Field Committee (Example)
  8. Part I: NCESGR Training Strategy  
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  13. Volunteer Trainer Activity Report
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  17. Training Outline (TO) Lesson Plan Template
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ENCLOSURE 1

RESPONSIBILITIES

1. National Committee for Employer Support of the Guard and Reserve (NCESGR). NCESGR shall:

a. Develop the National Volunteer Training program to include appropriate training measures (metrics) to assess volunteer training relevance, effectiveness, and ROI.

b. Appoint a Director, Training. The Director shall serve as a member of the Strategic Planning Subcommittee.

c. Establish a Volunteer Training Standardization and Evaluation Team; ensure all NCESGR Staff and FC volunteer trainers, training instructions, presentations, materials, practices, etc., conform to the format and content guidelines established within this Instruction.

d. Identify and validate NCESGR and FC training requirements.

e. Establish an ESGR Training Subcommittee.

f. Appoint Regional Training Directors who serve on the ESGR Training Subcommittee.

g. Establish a training support communications structure.

h. Train and validate FC Training Directors.

i. Provide CTD training program objectives.

j. Develop training materials and resources for FC.

k. Allocate resources to FC to conduct validated training activities.

l. Maintain a list of active CTD on the ESGR portal.

m. Assess the effectiveness of the training.

2. FC Chair. The FC Chair shall:

a. Assume all responsibility for the FC's training program.

b. Appoint a CTD to serve on the FC's Executive Committee.

c. Delegate the authority for training but not the responsibility.

d. Develop an Annual Training Plan in conjunction with the Annual Business Plan.

e. Allocate resources to accomplish the training mission.

f. Assess the effectiveness of the training.

3. CTD. The CTD shall:

a. Plan, organize, schedule, supervise, and evaluate all FC training.

b. Train FC leaders and Volunteer Trainers to conduct the required training.

c. Ensure standardization of training within FC.

d. Ensure all training materials are current.

e. Appoint, train, and evaluate additional Volunteer Trainers as required.

f. Maintain training records on ESGRNet.

g. Provide sustainment/refresher training to qualified FC Ombudsmen with coordination and assistance from the FC Ombudsman Director.

h. Ensure new Basic Volunteer Training adheres to orientation/training guidelines as provided by the sample training agenda (Enclosure 12).

i. Monitor the activities of the Area Trainer using the current Volunteer Training Activity report, as required (Enclosure 13).

j. Report volunteer training activities to the FC Chair, as required (Enclosure 14).

k. Report quarterly all FC volunteer training statistics via the Planning & Execution Performance Reporting System (PEPRS) (Enclosure 15).

l. Maintain a list of active Volunteer Trainers within the FC.

4. Volunteer Trainer. The Volunteer Trainer shall:

a. Maintain a thorough knowledge of ESGR policies, operations, organization, and training materials.

b. Assist the CTD with the planning, conducting, and evaluation of training.

c. Conduct volunteer training.

d. Build and maintain a volunteer training file for all volunteers.

e. Report results of all training activities to the CTD through the established reporting system.

ENCLOSURE 2

TRAINING EXECUTION, OPERATING, AND IMPLEMENTING PROCEDURES

1. Training Execution includes adequate preparation, effective presentation and practice, and thorough evaluation. Preparation for training includes, planning and preparation. Execution of training includes presentation, practice, and performance. These five actions are referred to as the 5-Ps. They are listed in detail in the checklist found at Enclosure 16.

a. Planning: To conduct effective training, trainers must plan their actions. Such plans are informal, tailored to meet the needs of each trainer. In most cases, such plans should be detailed in a Training Outline (Enclosure 17) or a lesson plan. Trainers will include the following planning tasks as they prepare to conduct volunteer training: Review the training program, proficiency of volunteers, resources, and the training environment. (Refer to Checklist at Enclosure 18.)

- (1) Determine the best sequence for conducting the training tasks.
- (2) Develop the Training Outline.
- (3) Finalize coordination of resources, events and activities.
- (4) Issue guidance to students about the training event.

b. Preparing. Preparing Committee volunteers who are to be trained, trainers (leaders) who conduct the training, and the place where the training will occur is required. (Refer to Enclosures 16 – 20.)

(1) Volunteers should have appropriate prerequisite skills or knowledge, specifically baseline information on ESGR programs and policy. The volunteers should be motivated to learn and perform. Volunteer Trainers should be proficient in the tasks/actions to be trained. Volunteer Trainers should also know how to train other volunteers to develop their skills. Volunteer Trainers should obtain, set up, and check all required facilities, materials, and equipment before training.

(2) As discussed above, planning culminates with the issuance of guidance for the training event, and then concludes with conducting pre-execution checks. Preparing for training is the vital step between planning for and conducting training. It is the key to ensuring optimum use of resources and to providing quality training to standard (Enclosure 21).

c. Presenting. FC Chairs shall ensure that the conduct of training meets all ESGR standards of planning, executing and evaluating.

Trainers shall:

(1) Explain all tasks/actions to be performed to volunteers, including conditions when the task is appropriate.

(2) Set up and initiate practice sessions. Use various techniques such as demonstrations, facilitation, briefings, rehearsal, lecture, conference, role-play, case study, Web-Based Training, and/or DVD.

(3) Check for volunteer understanding throughout the training session. Explain or demonstrate the task/action again as required to ensure complete comprehension/understanding.

(4) Execute training using a combination of the three basic methods of presentation: Demonstration (the preferred method) conference or lecture (the least preferred method). The trainer's selection of a specific method depends on the complexity of the task(s) and the level of proficiency of volunteers being trained.

(5) Conduct demonstrations with very simple basic tools. They personally perform the task, use flip charts and diagrams for illustration purposes, use computer simulations when available, develop practical exercises, and use role-play techniques to provide actual practice and learning opportunities.

(6) The conference method provides volunteers the opportunity to discuss the information presented. The trainer initiates and facilitates/guides the discussion. The conference method is most effective when the volunteers are familiar with the training task, when there is more than one correct technique, and when time is not critical. Conferences do not normally require hands-on performance.

(7) Lecture presents information with little discussion other than a question and answer period at the end of the training. Lectures are used when time is limited, when volunteers know little about the subject, and when the lecture is preparing them for demonstration and practice. Lectures are used if there is a large group to be trained or as an introduction to a demonstration.

d. Practicing. Volunteers apply what they have learned by actually performing the task. This is the critical phase of training. At first, practice is closely controlled by the trainer and is geared to the volunteers' current abilities. Later, trainers emphasize speed and realism until the volunteers can perform independently. Trainers continually coach during practice and conduct an After Action Review (AAR) at the end of the training session. To do this, they must evaluate. Every trainer is an evaluator.

e. Performing. After practice is complete, trainers evaluate the volunteers' performance against the published standards for the training task/action. Such evaluations determine how well the training program is meeting the training objectives.

2. Informal planning, detailed coordination, and preparation for executing training continue until the training is performed. Preparation for training includes selecting the training tasks to be trained, planning the conduct of the training, training the trainers, checking out the training site, issuing the training plan, conducting rehearsals, and pre-execution checks. Pre-execution checks are the preliminary actions trainers use to monitor preparation activities and follow up.

3. Conduct of training. Ideally, training is executed using a systematic approach, beginning with simple basic task/steps and logically and sequentially progressing to the more complex tasks/steps. The major training objective is broken down into manageable subtasks or steps, which allow the volunteer participant to learn and practice performing each task/step. The conditions may be controlled and managed by the trainer to present a more realistic scenario for the participants, to more adequately prepare them to perform. In this way, the standards remain the same; however, the conditions under which they are trained may change.

4. Trainers may use appropriate combinations of demonstrations, conferences, discussions, role-play, and practice activities to present training. Trainers begin by presenting the training objectives and evaluation methods. They immediately follow presentation with practice to convert information into usable individual skills. The amount of detail included in practice depends upon the experience level. If participants are receiving initial training on a task, trainers emphasize the basic conditions. If those receiving the training are receiving sustainment training, trainers raise the level of detail until the conditions replicate the task/action as closely as possible.

5. Conduct an After Action Review (AAR).

a. The AAR is a process designed to provide feedback for all training. The AAR is a structured review process that allows participating volunteers and FC to discover what happened during the training, why it happened, and identify position training experience and assess for improvement. The AAR is a professional discussion that requires the active participation of all participants.

b. The AAR is not a critique and has the following advantages over one:

(1) Focuses directly on key training objectives derived from the FC mission/goals.

(2) Emphasizes meeting prescribed ESGR standards rather than promoting judgment of success or failure.

(3) Uses 'leading questions' to encourage participants to self-discover important lessons from the training event.

(4) Allows a large number of volunteer members and leaders to participate so that more of the training can be recalled and more lessons can be shared.

c. The AAR consists of four parts:

(1) Review what was supposed to happen (training plans). The trainer and/or evaluator/leaders, along with the participants, reviews what was supposed to happen based on the FC Chair's intent for the training event, committee training plan, and training objectives.

(2) Establish what happened. The trainer and/or evaluator and the participants determine what actually happened during performance of the training task. A factual and indisputable account is vital to the effectiveness of the discussion that follows.

(3) Determine what was right or wrong with what happened. The participants establish the strong and weak points of their performance. The trainer and/or evaluator plays a critical role in guiding the discussion so that conclusions reached by participants are doctrinally sound, consistent with prescribed ESGR standards, and relevant to the ESGR mission.

(4) Determine how the training task should be done differently the next time. The trainer and/or evaluator assists the Committee members and leaders undergoing the training to lead the group in determining exactly how participants will perform differently the next time the training task is performed. This results in Committee and individual volunteer motivation to conduct future sustainment training to standard.

6. Retrain/Sustain.

a. Committee leaders understand that not all training tasks may be performed to standard, and in their initial planning, they should allocate time and other resources for retraining when and where necessary.

b. Retraining allows the participants to apply the lessons learned during the AAR and implement corrective action. It is important for FC leaders to understand that the training is incomplete until the prescribed ESGR standard is achieved.

c. The AAR may reveal the need for retraining. If the FC Chair and/or CTD determine additional training is required, it should be scheduled as soon as possible. The golden rule is that training is incomplete until the task/action is trained to standard. The critical question for FC Chairs is, “When do you conduct retraining?”

The Primary Tasks in Training Execution are summarized below:

Prepare	Conduct	Retrain/Sustain
<ul style="list-style-type: none"> <li>• Prepare for Training</li> <li>• Plan the Training</li> <li>• Train the Trainer(s)</li> <li>• Confirm the Training Site</li> <li>• Select Tasks</li> <li>• Conduct Risk and/or Safety Assessment</li> <li>• Issue the Training Plan</li> <li>• Rehearse</li> <li>• Conduct Pre-execution Checks</li> </ul>	<ul style="list-style-type: none"> <li>• Supervise and Evaluate Hazard Controls</li> <li>• Execute Training</li> <li>• Conduct After Action Review</li> </ul>	<ul style="list-style-type: none"> <li>• Retrain when required</li> <li>• Schedule Refresher training to sustain skills</li> </ul>

ENCLOSURE 3

TRAINING LINKAGE TO STRATEGIC PLAN

GOAL / OBJECTIVE	EO	MO	OMB	TNG	PA	AWD	R&R	VOL MGT
1. Gain and maintain support from employers of Guard and Reserve members								
1.1. Conduct focused outreach efforts to gain Statements of Support from 20% of identified RC employers annually. (Responsible Office: HQ and Field Committees)	X	X	X	X	X	X	X	X
1.2. Conduct focused outreach efforts to brief all mobilizing RC members annually. (Responsible Office: HQ and Field Committees)	X	X	X	X	X	X		
1.3. Contact all RC units annually. (Responsible Office: HQ and Field Committees)	X	X	X	X	X	X		
1.4. Increase by 10% annually the proportion of Ombudsman Cases closed within 14 days. (Responsible Office: HQ and Field Committees)	X	X	X	X				
2. Educate Customers and Stakeholders								
2.1. Identify and develop new, or update existing, marketing materials annually. (Responsible Office: Outreach Subcommittee)	X			X	X			
2.2. Review annually (FY) and develop, as needed, training materials for employers, National Guard, and Reserve members. (Responsible Office: Training Subcommittee)	X	X	X	X	X	X	X	X
3. Advocate for RC Employers within DoD								
3.1. Provide an annual report to the Secretary of Defense identifying employer concerns and successes. (Responsible Office: National Chair and Executive Director)	X	X	X	X	X	X	X	X
3.2. Promote the importance of employer support through regular communications to senior RC leadership. (Responsible Office: HQ)	X	X			X			
4. Transform ESGR organizational structure to be relevant, effective, and efficient								
4.1. Review existing training requirements annually (FY) and identify, as needed, new training requirements for all volunteer and staff positions. (Responsible Office: Training Subcommittee)	X	X	X	X	X	X	X	
4.2. Review existing training materials annually (FY) and identify, as needed, new training materials, tools, and methods. (Responsible Office: Training Subcommittee)	X	X	X	X	X	X	X	X
4.3. Recruit and retain a diverse pool of volunteers reflecting the demographics of Committee jurisdictions. (Responsible Office: Field Committees)	X	X	X	X	X	X	X	X
4.4. Develop, field, and update annually a comprehensive information technology system that provides a singular source of information for the organization by 1 October 2008. (Responsible Office: HQ and Information Technology Subcommittees)	X	X	X	X	X	X	X	X

ENCLOSURE 4

FIELD COMMITTEE NEAR-TERM 120 DAY ACTION PLAN  
(EXAMPLE)

<b>TASK/ACTION EVENT</b>	<b>30 DAYS</b>	<b>60 DAYS</b>	<b>90 DAYS</b>	<b>120 DAYS</b>	<b>REMARKS</b>
<b>MEETINGS</b>					
<b>VOLUNTEER TRAINING</b>					
<b>EMPLOYER OUTREACH</b>					
<b>MILITARY OUTREACH</b>					
<b>OMBUDSMAN SUPPORT</b>					
<b>PUBLIC AFFAIRS</b>					
<b>AWARDS RECOGNITION</b>					
<b>RECRUITING</b>					
<b>VOLUNTEER MANAGEMENT</b>					
<b>TRAVEL REIMBURSEMENT</b>					
<b>PRESIDENTIAL VOLUNTEER SERVICE AWARDS</b>					

NOTE: Example Near Term Action Plan tool to project volunteer training needs 30 to 120 days out based on each Task/Action Event objective. Use this example to schedule objective deadlines or milestones for the training event or task listed on the left side of the table. In Remarks column, notate the number of volunteers you plan to have trained, event accomplished, etc. Modify as needed.

ENCLOSURE 5

FIELD COMMITTEE CHAIR COMMITTEE OPERATIONS VOLUNTEER TRAINING  
ASSESSMENT

MISSION AREA	1	2	3	4	5	AREA CHAIR ASSESS	EXEC DIR ASSESS	FC CHAIR ASSESS	OVERALL ASSESS
<b>OPERATIONS/TRAINING:</b>									
1. EMPLOYER OUTREACH									
2. MILITARY OUTREACH									
3. OMBUDSMAN SUPPORT									
4. VOLUNTEER TRAINING									
5. PUBLIC AFFAIRS									
6. AWARDS and RECOGNITION									
7. RECRUITING									
8. VOLUNTEER MANAGEMENT									
9. NEW MEMBER TRAINING									
10. BUDGET EXECUTION									
11. OMBUDSMAN CASE MANAGEMENT									
<b>LEADERSHIP:</b>									
12. LEADING									
13. DIRECTING									
14. GUIDING									
15. MANAGING									
16. INFLUENCING									
17. PLANNING									
18. MENTORING									
19. COMMUNICATING									
20. NETWORKING									
21. ADMINISTRATING									
22. INFORMATION MANAGEMENT									

Volunteer Name: \_\_\_\_\_

Assessor Name: \_\_\_\_\_

Date: \_\_\_\_\_

Rating Legend:

- 1: Can perform the mission/task/function.
- 2: Can perform the mission/task/function with additional resources/training.
- 3: Can perform the mission /task/function, but requires significant additional resources/training.
- 4: Cannot perform the mission/task/function without major resource/training support.
- 5: Cannot perform the mission/task/function.

ENCLOSURE 6

NCESGR AND FIELD COMMITTEE TRAINING REQUIREMENTS

NCESGR TRAINING REQUIREMENTS:

- Plan, resource and conduct New FC Chair training.
- Plan, resource and conduct Ombudsman Qualification training.
- Plan, resource and conduct a Committee Training Director Train-the-Trainer Validation course/workshop as needed.
- Plan, resource and conduct an NCESGR Training Subcommittee (TSC) meeting once annually.
- Train and validate all FC Leaders (Directors) in their functional job description.
- Plan, resource and conduct all APSS/PSS initial training.
- Plan, resource and conduct one Regional Leadership Training Meeting/Conference annually in each ESGR Region.
- Perform quarterly FC training standardization visits to evaluate volunteer training and volunteer instructors.

FIELD COMMITTEE TRAINING REQUIREMENTS:

- Conduct Volunteer Orientation.
- Train and validate all Volunteers in Basic Volunteer Training.
- Provide refresher training for all FC Leaders (Directors).
- Plan, resource and conduct FC Volunteer and functional area refresher training as needed.
- Plan, resource and conduct quarterly FC Executive Committee Training Meetings/Conferences.
- Ensure all functional area leaders; FC Chair, Vice Chair, Executive Director, Area Chairs, Ombudsman Directors, Employer and Military Outreach Directors, Training Directors, and Public Affairs Directors attend annual NCESGR Regional Leadership Training Meeting/Conference.
- Plan, resource and conduct one FC Annual Business/Training Meeting/Annual Planning and Awards Conference.

ENCLOSURE 7

TRAINING PRIORITIES, NCESGR AND FIELD COMMITTEE  
(EXAMPLE)

NCESGR

- New Chair Training
- Area Chair Training
- PSS/APSS Training
- Volunteer Management Training
- Basic Volunteer Training
- Basic Ombudsman Training
- Employer Outreach Director Training
- Military Outreach Director Training
- Train-the-Trainer
- Training Director
- Public Affairs Director

FIELD COMMITTEE (RECOMMENDED EXAMPLE)

- Volunteer Orientation
- Train-the-Trainer
- Basic Volunteer Training
- Employer Outreach Volunteer Training
- Military Outreach Volunteer Training
- Public Affairs Representative Training
- Employer Awards Training
- Ombudsman Sustainment/Refresher Training

ENCLOSURE 8

PART I: NCESGR TRAINING STRATEGY

<p><b>ENDS</b></p>	<p><b>Goals:</b>                  Recruit New Volunteer Members.                  Train Volunteer Members                  Conduct Employer Outreach                  Conduct Military Outreach                  Conduct Ombudsman Support and Service                  Recognize and Award Employers and Volunteer Members                  Conduct Public Affairs and Marketing Activities                  Provide Volunteer Management                  Provide travel reimbursement to members</p> <p><b>Measurements/Results:</b>                  Orientation within 30 days                  Basic Volunteer Training in 90 days                  Statements of Support                  Establish G/R Employer Relations/Support                  Resolve/ Reduce/Negate USERRA Cases                  Patriot, Chairman, Pro Patria, Freedom                  Press Releases, Media Relations                  Motivate, Train, Assign, Mentor, Reward                  Prompt reimbursement within 4 weeks</p>																				
<p><b>WAYS</b></p>	<ul style="list-style-type: none"> <li>• Training Program Elements: Volunteer Orientation, Basic Volunteer Training, Leader Training, Advanced Volunteer Training.</li> <li>• Training Objectives for Job Positions that support Training Priorities</li> <li>• Events:                         <ul style="list-style-type: none"> <li>• Annual NCESGR Regional Training / Workshop concept to train and sustain Field Committee Leaders</li> <li>• Field Committee Chair Training Course</li> <li>• Field Committee Executive Director Training Course</li> <li>• Field Committee Area Chair Training Course</li> <li>• Field Committee Employer and Military Outreach Training Course</li> <li>• Field Committee Public Affairs Training Course</li> <li>• Committee Training Director Train the Trainer Course</li> <li>• Ombudsman Qualification Course</li> </ul> </li> <li>• Concept:                         <ul style="list-style-type: none"> <li>• Centralized Volunteer Management Training will be conducted at the NCESGR level consisting of:                                 <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">FC Chair</td> <td>Committee Training Director</td> </tr> <tr> <td>Executive Director</td> <td>Employer Outreach Director</td> </tr> <tr> <td>Area Chair</td> <td>Military Outreach Director</td> </tr> <tr> <td>Ombudsman</td> <td>Public Affairs Director</td> </tr> </table> </li> <li>• Decentralized Volunteer training will be conducted at the Field Committee level consisting of:                                 <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Volunteer Trainer Train the Trainer</td> <td>Ombudsman Sustainment (Refresher)</td> </tr> <tr> <td>Employer Outreach Volunteer</td> <td>Public Affairs Rep</td> </tr> <tr> <td>Military Outreach Volunteer</td> <td>Awards and Recognition Rep</td> </tr> </table> </li> <li>• Leader positions that can be trained by NCESGR and/or Field Committee:                                 <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Employer Outreach Director</td> <td>Awards and Recognition Director</td> </tr> <tr> <td>Military Outreach Director</td> <td>Bosslift Coordinator</td> </tr> <tr> <td>Public Affairs Director</td> <td>Volunteer Management Director</td> </tr> </table> </li> </ul> </li> <li>• Implementing Objectives/Actions:                         <ul style="list-style-type: none"> <li>• Train and Validate CTDs.</li> <li>• Develop the Lesson Plan package for the training objectives for all Field Committee volunteer job descriptions..</li> <li>• Develop the Lesson Plan package for the training objectives for Committee Leader.</li> <li>• All Field Committees develop annual training plan, with calendar and budget by May 31, each calendar year.</li> <li>• Implement training plan annually.</li> <li>• Field Committees and NCESGR Staff validate training plan and products annually.</li> <li>• Train all Volunteer Trainers in 'Train the Trainer'.</li> <li>• Train all new Volunteers in Basic Volunteer Training annually.</li> <li>• Train all Committee Mission Functional Directors/Coordinators (Leaders).</li> <li>• Train all Field Committee Military Outreach Volunteers.</li> <li>• Train all NCESGR Staff personnel in 'Volunteerism' and in basic staff operations.</li> <li>• Continue to train above priorities, and expand training/retraining to specific Volunteer Job Descriptions.</li> <li>• Sustain/Retrain selected FC Leader Positions during Annual Regional Leader Conferences</li> </ul> </li> </ul>	FC Chair	Committee Training Director	Executive Director	Employer Outreach Director	Area Chair	Military Outreach Director	Ombudsman	Public Affairs Director	Volunteer Trainer Train the Trainer	Ombudsman Sustainment (Refresher)	Employer Outreach Volunteer	Public Affairs Rep	Military Outreach Volunteer	Awards and Recognition Rep	Employer Outreach Director	Awards and Recognition Director	Military Outreach Director	Bosslift Coordinator	Public Affairs Director	Volunteer Management Director
FC Chair	Committee Training Director																				
Executive Director	Employer Outreach Director																				
Area Chair	Military Outreach Director																				
Ombudsman	Public Affairs Director																				
Volunteer Trainer Train the Trainer	Ombudsman Sustainment (Refresher)																				
Employer Outreach Volunteer	Public Affairs Rep																				
Military Outreach Volunteer	Awards and Recognition Rep																				
Employer Outreach Director	Awards and Recognition Director																				
Military Outreach Director	Bosslift Coordinator																				
Public Affairs Director	Volunteer Management Director																				
<p><b>MEANS</b></p>	<p><b>RESOURCES: Time, Personnel, Training Budget, AV/WBT Equip, Materials, Facilities, Trainers, Lesson Plans</b></p> <ul style="list-style-type: none"> <li>• Develop annual volunteer training budget projections, and predictable budget for the out-years of the Strategic Plan.</li> <li>• Implement a contractor-based, DoD-funded, training concept that trains Field Committee Chairs, Executive Directors, Area Chairs, Employer and Military Outreach Directors, PA Directors, Ombudsman Directors, and CTDs.</li> <li>• Throughout the Volunteer Training Program, specific training areas will be evaluated for their application in the volunteer setting, NCESGR and FC Strategic Planning business impact, and ROI.</li> </ul>																				

PART II: NCESGR TRAINING STRATEGY

TRAINING TASK	INIT.	TIME HOURS	FREQ	EVENT	METHOD	EVAL	RESOURCE MATERIALS
REGIONAL LEADERSHIP CONF/ WORKSHOP EACH ESGR REGION	X	16	4 X ANN	NCESGR CONF	FACILITATE CONF DISCUSS	SUB OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
OMBUDSMAN QUALIFICATION	X	20	1-3 X ANN	NCESGR TRAINING COURSE	FACILITATE CONF. DISCUSS PRACT EXER ROLE PLAY CASE STUDY	OBJ PRACT EXER	VOL TRNG INST OMB INSTR LP
FIELD COMMITTEE NEW CHAIR	X	24	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
EXECUTIVE DIRECTOR	X	24	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
PSS / APSS	X	36	1	NGB/NCESGR TRAINING COURSE	FACILITATE CONF & DEMO PRACT EXER	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
AREA CHAIR	X	24	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
EMPLOYER OUTREACH DIRECTOR	X	20	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
MILITARY OUTREACH DIRECTOR	X	20	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
TRAINING DIRECTOR	X	20	1	NCESGR TRAINING COURSE	FACILITATE CONF/DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
PUBLIC AFFAIRS DIRECTOR	X	20	1	NCESGR TRAINING COURSE	FACILITATE CONF. PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST PA INSTR LP
AWARDS & REC DIRECTOR	X	4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST AWD INSTR LP
BOSSLIFT COORDINATOR	X	4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST B-LIFT INSTR LP
RECRUITING DIRECTOR	X	4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST LP
VOLUNTEER MANAGEMENT DIRECTOR	X	4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST VOL MGT LP

**PART III: FIELD COMMITTEE TRAINING STRATEGY (RECOMMENDED)**

TRAINING TASK	INIT.	SUSTAIN RETRAIN	TIME HOURS	FREQ	EVENT	METHOD	EVAL	RESOURCE MATERIALS
ANNUAL TRAINING CONFERENCE (NON-ORF)		X	6-8	1 X ANN	FC ANNUAL PLAN & AWD CONF	FACILITATE CONF LEC	SUB OBJ	VOL TRNG INST TNG OBJ LP
VOL ORIENTATION (NEW MEMBER)	X		1	1 X ANN	FC INFORMAL MEETING	FACILITATE CONF.	SUB	VOL TRNG INST TNG OBJ LP
TRAIN THE TRAINER VOLUNTEER TRAINER	X	X	8	1 X ANN	FC TRAINING COURSE	FACILITATE CONF & DEMO PRACT EXER ROLE PLAY	OBJ PRACT EXER	VOL TRNG INST TNG OBJ LP
BASIC VOLUNTEER TRAINING (NEW MEMBER)	X	X	4	QTRLY	FC BASIC TRAINING COURSE	FACILITATE LECTURE CONF.	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
EMPLOYER OUTREACH VOLUNTEER	X	X	4-6	QTRLY	FC TRAINING COURSE	FACILITATE CONF. PRACT EXER ROLE PLAY	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
MILITARY OUTREACH VOLUNTEER	X	X	4-6	QTRLY	FC TRAINING COURSE	FACILITATE CONF. PRACT EXER ROLE PLAY	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
OMBUDSMAN SUSTAINMENT / REFRESHER	X	X	8	1 X ANN	FC TRAINING COURSE	FACILITATE CONF. ROLE PLAY CASE STUDY	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
PUBLIC AFFAIRS VOLUNTEER	X	X	4	1 X ANN	FC TRAINING	FACILITATE PRACT EXER	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
AWARDS & RECOG VOLUNTEER	X	X	4	1 X ANN	FC TRAINING	FACILITATE PRACT EXER	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
BOSSLIFT VOLUNTEER	X	X	4	1 X ANN	FC TRAINING	FACILITATE PRACT EXER	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
VOL MANAGEMENT VOLUNTEER	X	X	4	1 X ANN	FC TRAINING	FACILITATE PRACT EXER	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
RECRUITING VOLUNTEER	X	X	4	1 X ANN	FC TRAINING	FACILITATE PRACT EXER	OBJ POST TEST	VOL TRNG INST TNG OBJ LP
AWARDS & REC DIRECTOR	X		4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST AWD INSTR LP
BOSSLIFT COORDINATOR	X	X	4-6	1	NCESG/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST B-LIFT INST LP
RECRUITING DIRECTOR	X		4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST LP
VOLUNTEER MANAGEMENT DIRECTOR	X		4-6	1	NCESGR/FC TRAINING COURSE	FACILITATE CONF. PRACT EXER	OBJ PRACT EXER	VOL TRNG INST VOL MGT LP

ENCLOSURE 9

FIELD COMMITTEE TRAINING BUDGET  
(EXAMPLE)

TRAINING TASK	INITIAL	SUSTAIN RETRAIN	TIME HRS	FREQ	EVENT SITE	# OF VOLS	MILES (.485)	RESOURCES MATERIALS COST	LODGE COST	TOTAL COST
ANNUAL TRAINING CONFERENCE		X	4	1X YR	COMM TNG	75-100	5100X1 5100	400X1 400	4500X1 4500	10000
BASIC VOLUNTEER	X		1	12X YR	AREA TNG	5X12	400X5 2000	200X1 200	XXX	2200
TRAIN-THE- TRAINER	X		8	1X YR	COMM TNG	25X1	2780X1 2780	200X1 200	900X1 900	3880
BASIC VOLUNTEER TRAINING	X		8	4X YR	COMM TNG	15X4	1335X4 5340	100X4 400	450X4 1800	7540
EMPLOYER OUTREACH	X		4	1X YR	COMM TNG	15X1	668X1 668	200X1 200	450X1 450	1318
MILITARY OUTREACH	X		4	1X YR	COMM TNG	45X1	2004X1 2004	200X1 200	450X1 450	2654
OMBUDSMAN SUSTAINMENT		X	8	1X YR	COMM TNG	50X1	2225X1 2225	200X1 200	2250X1 2250	4675
PUBLIC AFFAIRS	X		4	1X YR	COMM TNG	15X1	668X1 668	200X1 200	450X1 450	1318
AWARDS	X		4	1X YR	COMM TNG	15X1	668X1 668	200X1 200	450X1 450	1318
QUARTERLY TRAINING MEETINGS		X	4	4X YR	AREA TNG	10X4	445X4 2225	200X4 800	450X4 1800	4825
TOTAL TRAINING BUDGET										39728

PROCEDURE:

1. Prioritize training needs and validate requirements:
  - a. Standard needs assessment.
  - b. Place numbers in columns by each subject or task.
  - c. Enter dollar estimates for each training subject or task: include travel; per diem; lodging
2. Calculate totals.
3. Match your allocated budget to your prioritized needs.
4. Distribute your budget allocation to meet your Field Committee's environment.
5. Use as documentation for future budget development.

ENCLOSURE 10

FIELD COMMITTEE TRAINING METRICS (EXAMPLE)

TRAINING METRIC	GOAL	ACTUAL
1. % of new Volunteers receiving Volunteer Orientation.	100 %	
2. % of new Volunteers trained in Basic Volunteer Training within 3 months after becoming members.	100 %	
3. % of new Volunteers trained in Basic USERRA within 6 months after becoming members.	100 %	
4. % of new Volunteers trained in assigned Job Description within 6 months after becoming members.	100 %	
5. % of Volunteers trained in assigned Job Description on average.	75 %	
6. Committee Training Director trained and validated.	1	
7. # of Volunteer Trainers trained in Train the Trainer as determined by the FC requirements.	#	
8. % of Volunteer Leaders trained as Functional Directors/Coordinators per requirement.	100 %	
9. # Certified Ombudsman as determined by FC requirements.	#	
10. # Volunteers trained as Employer Outreach Volunteers as determined by FC requirements.	#	
11. # Volunteers trained as Military Outreach Volunteers as determined by FC requirements and # of G/R Units.	#	
12. % of execution of training budget.	100 %	

ENCLOSURE 11

CTD TRAINING AND EVALUATION VALIDATION CRITERIA

1. Demonstrate an understanding of CTD roles and responsibilities.
2. Demonstrate a practical understanding of adult learning techniques.
3. Demonstrate the ability to train and validate Volunteer Trainers to plan, prepare, conduct, and evaluate the training of volunteer members.
4. Demonstrate the ability to train Volunteer Trainers to understand the ESGR training concept and training process.
5. Demonstrate proficiency in training management techniques:
  - a. Develop training guidance.
  - b. Develop a training plan.
  - c. Develop a planning calendar.
  - d. Develop a training budget.
6. Demonstrate proficiency in Train-the-Trainer techniques:
  - a. Planning.
  - b. Preparing.
  - c. Conducting, to include presenting, practicing and performing and evaluating.
7. Plan and conduct an after action report.
8. Demonstrate proficiency in recording volunteer training results into training database on ESGRNet.

ENCLOSURE 12

VOLUNTEER ORIENTATION TRAINING AGENDA  
(EXAMPLE)

<u>TIME</u>	<u>SUBJECT</u>	<u>INSTRUCTOR</u>	<u>LOCATION</u>
8:00-8:15	Admin and Introductions	TBD	TBD
8:15-9:00	Welcome, Mission, Vision, Strategy (National and State Business Plans are Discussed)	TBD	TBD
9:00-10:00	Basic ESGR Brief (Organization, GWOT effects, Statement of Support, Awards)	TBD	TBD
10:00-11:00	Military Outreach Program (Unit Outreach, Employer Support Relations for Reserve and Guard Units)	TBD	TBD
11:00-12:00	Employer Outreach (Statement of Support Program)	TBD	TBD
12:00-1:00	Lunch		
1:00- 2:00	Ombudsmen Training (Intro to USERRA)	TBD	TBD
2:00- 3:00	Training	TBD	TBD
3:00-4:00	Information Tech: Website, ESGRNet Volunteer Management, Finance, Travel Reimbursements, Fulfillment Requirements	TBD	
4:00-5:00	Training Evaluation, Questions and Answers	TBD	

Note: Committee Chairs adjust training time to satisfy their needs.

ENCLOSURE 13

VOLUNTEER TRAINER ACTIVITY REPORT

Field Committee: \_\_\_\_\_ New Volunteer Trainer: \_\_\_\_\_

Date: \_\_\_\_\_

Activity: \_\_\_\_\_

# Personnel attending: \_\_\_\_\_

Purpose: (Mark the block which applies to your activity)

- Initial Contact/Visit
- Follow-Up Visit
- New Volunteer Training Activity (Specify below)
  - ESGR Briefing # Briefed \_\_\_\_\_
  - ESGR Orientation Briefing # Briefed \_\_\_\_\_
- Train the Trainer Training
- Leader/Director/Coordinator Training
- NCESGR Region Training
- Committee Area Volunteer Training
- Other (Specify below)

(Check each block that applies and specify below)

- New volunteer completed ESGR New Volunteer Training
- New volunteer has indicated a choice of ESGR Committee
- Committee Chair has been contacted with new volunteer information
- New volunteer is involved with ESGR to include hours

Comments:

NOTE: Recommended Volunteer Trainer tool to track and maintain records of volunteer training activities within the FC as needed. The activity report is meant to be utilized at the FC level to monitor training by Volunteer Trainers. Upon completion of the Training Portal, the information provided may be utilized to update online tracking of training within the FC.



ENCLOSURE 15

QUARTERLY VOLUNTEER TRAINING TRACKING REPORT

<b>Volunteer Course Description</b>	<b>1<sup>st</sup> Qtr Student Total</b>	<b>2<sup>nd</sup> Qtr Student Total</b>	<b>3<sup>rd</sup> Qtr Student Total</b>	<b>4<sup>th</sup> Qtr Student Total</b>	<b>FY Student Total</b>	<b><u>Goal</u></b>
New Volunteer Orientation Training						
Basic Volunteer Training						
Employer Outreach Director Training						
Employer Outreach Volunteer Training						
Military Outreach Director Training						
Military Outreach Volunteer Training						
Ombudsman Sustainment/ Refresher Training						
USERRA 101 Online Training						
NCESGR Ombudsman Qualification Training						
Train-the-Trainer						
Public Affairs Director & Representative Training						
Employer Awards Training						
Bosslift Coordinator Training						
ESGR Volunteer Refresher Training						

**NOTE:** Recommended CTD training tool to track the number of volunteers trained quarterly within each training category. Work with your FC Chair to establish annual training goals for each course category of this report and record in the appropriate training goal area. Report quarterly all FC volunteer training statistics via the Planning & Execution Performance Reporting System (PEPRS).

ENCLOSURE 16

FIVE "P" CHECKLIST FOR TRAIN-THE-TRAINER

1. PLANNING.

- a. Review Committee training guidance:
  - Review the training objective.
  - Determine the volunteers to be trained.
  - Determine the place and time for training.
  - Determine the resources and facilities available.
  - Review training references.
  - Review coordinating instructions and special considerations.
  
- b. Use backward planning:
  - Determine what, where, how, and when the training will take place.
  - List all necessary actions to prepare for training.
  - Estimate the time needed for each action.
  - Arrange the time needed for each action.
  - Arrange the necessary actions in reverse order; beginning with the last action and working back to the first.
  - Schedule the necessary actions.
  
- c. Develop the training outline:
  - Write a training statement based on the training objective.
  - Develop a caution statement (personnel, equipment, or weather hazards or risk).
  - Select the presentation method (demonstration, practice, conference, role play, case study, lecture, or combination of two or more).
  - Address a pretest, if applicable.

2. PREPARING.

- a. Prepare yourself:
  - Know how to perform the task being trained.
  - Know how to train others to perform the task.
  
- b. Prepare the volunteers:
  - Identify the volunteers to be trained.
  - Motivate the volunteers.
  - Announce the training.
  - Train any prerequisite tasks first.
  
- c. Prepare the equipment, facilities, and materials:
  - Reserve, request, and requisition.
  - Receive equipment and materials before rehearsals.

- Operate the equipment to become familiar with it and to check it for completeness and spare parts.
- d. Prepare the training support personnel (Volunteer Trainers):
  - Ensure they understand their support roles.
  - Ensure they know their role as evaluators.
  - Ensure they are equipped and prepared to perform.
- 3. PRESENTING.
  - Provide enough information to permit practice.
  - Give information that motivates.
  - Present information that allows transfer of training if applicable.
  - Tell the volunteers the exact task, conditions, and standard.
- 4. PRACTICING.
  - a. Train the task step by step:
    - Give the volunteers a basic knowledge of each task.
    - Build confidence.
  - b. Train the tasks to standards:
    - Improve the volunteers' performance to meet the training objective standards.
    - Use sustainment training.
  - c. Train the tasks in realistic settings:
    - Add realism to increase the challenge.
    - Train to achieve time requirements.
    - Use sustainment training.
- 5. PERFORMING.
  - Evaluate performance with a post-training check, by sampling, on-the-job observation, test or evaluation by CTD or Committee leaders.
  - Record and report the results.

ENCLOSURE 17

TRAINING OUTLINE LESSON PLAN TEMPLATE

General. A training outline (TO) is an organized outline of the training material to be presented. Although a TO may have the same general types of information as a Training and Evaluation Outline, a TO adds specificity and focus. It is used primarily for individual volunteer training tasks.

1	<b>TRAINING STATEMENT:</b> Training statements are based on the stated training objectives. Training statements list the tasks, conditions, and performance standards. Trainers phrase the statements in their own words to make sure the volunteer members understand what is expected of them.
2	<b>CAUTION STATEMENT:</b> Caution statements inform the trainees of known or potential safety hazards or risk. Tasks that do not offer any personal hazards will not need caution statements.
3	<b>PRETEST:</b> Pretests are optional for the trainer. Pretests are more often mental exercises for the trainer. This is an important step for the trainer in order to determine the level of knowledge and/or understanding the trainees actually have before the training begins. The pretest should be tailored to the experience level of the training audience.
4	<b>ORIENTATION STATEMENT:</b> ESGR Volunteers must be told why the training is important. The task(s) to be trained must be related to the ESGR mission. This orientation is followed by the presentation of training.
5	<b>PRESENTATION METHOD:</b> The preferred methods of presentation are demonstration, conference, discussion, case study, role play, distributed learning, and/or lecture.
6	<b>TASK STEPS:</b> Trainers explain the required steps, preferably by demonstration. Trainers conduct a step-by-step walk through with the trainees making them complete each step before moving on to the next step. Individual task steps should be listed on the training outline and followed in the listed sequence. Task steps should be followed by practice.
7	<b>PRACTICE:</b> Practice is the major part of any training. Volunteers first practice individual steps with the trainer's supervision. Finally, volunteers put all of the steps together and practice the whole task. Task practice and repetition will instill confidence and build self-esteem in the volunteer.
8	<b>PERFORMANCE EVALUATIONS:</b> The final part of any training is the performance evaluation. For individual volunteer task training, this is the same as the pretest. If the Volunteer can perform the task to standard, they are considered trained. If the volunteer cannot perform the training task to standard, repeat training may be necessary.
9	<b>REQUIRED RESOURCES:</b> List all training materials, visual aids, publications, equipment, handouts, etc. that is required to conduct and support the training.
10	<b>TRAINER NOTES:</b> The trainer should list any notes that may be pertinent to the training session.

ENCLOSURE 18

CTD TRAINING MANAGEMENT CHECKLIST

1. ASSESSMENT:

- Review the National Committee for Employer Support of the Guard and Reserve (NCESGR) training requirements.
- Conduct an assessment of the Field Committee's (FC) training proficiency.
- Observe volunteers' performance.
- Solicit input from FC leaders.
- Solicit input from volunteers.
- Solicit input from Regional Deputy Director.
- Review past individual volunteer training.
- Review past FC events.
- Conduct a training meeting with volunteers to discuss training effectiveness.
- Review Committee volunteer training records.
- Conduct an After Action Review (AAR).
- Evaluate training.
- Reassess.

2. PLANNING:

- Based upon your assessment, develop training plans that enable the volunteers and FC to perform the ESGR mission.
- Review NCESGR Strategic Plan.
- Schedule an Annual Committee Planning and Resource Conference March-to-April timeframe.
- Review NCESGR Annual Short-Range Training Plan and calendar.
- Develop Committee Annual (Business) Short-Range Training Plan and two-year calendar, with projected budget and resource requirements.
- Prioritize individual training requirements for volunteers, and collective requirements for FC.
- Analyze budget request, and resource requirements to conduct the planned training, and determine shortfalls, make necessary adjustment.
- Schedule NCESGR requirements.
- Schedule FC requirements.
- Consider Guard and Reserve unit training calendars to prevent schedule conflicts.
- Schedule firm requirements for Year 1 execution, and planned requirements for Year 2.
- Brief training plan, with supporting budget (Business Plan) to Committee Chair and Leaders for approval, in March-April timeframe.
- Submit plan to NCESGR in April-May timeframe.
- Develop Near-Term Plan every (3 months) to confirm planning and execution of Volunteer and Committee training quarterly.

- Review past training and next 3 months training plan during quarterly Steering/Executive Committee meetings, and during subsequent quarterly Area Committee meetings.
- Evaluate, assess, and make necessary adjustments.

3. EXECUTION:

- Perform Volunteer Trainer planning and preparation to conduct Committee training as recommended in the checklists as recommended in Enclosures 7-11.

4. EVALUATE:

- Evaluate volunteer and FC training to determine if volunteers can perform their assigned jobs/tasks to standard.
- Use the performance measures included with all training objectives as a guide for evaluation.

5. AFTER ACTION REVIEW:

- Conduct a thorough AAR after all training to determine strengths and weaknesses, and determine what adjustments must be made for the future.

6. ASSESS:

- Conduct an assessment of the training to continue awareness of training effectiveness.

ENCLOSURE 19

CTD VOLUNTEER/TRAINER CHECKLIST

The following steps are designed to help the ESGR Volunteer Trainer/Director provide assistance to their assigned new volunteers and help determine which Subcommittee they will best serve.

1.  Receive list of all volunteers or CTD in your area of responsibility.
2.  Build a volunteer file for each area of responsibility.
3.  Make initial contact with each volunteer.
4.  Schedule a personal meeting with the area leadership to determine their Volunteer Training program.
5.  Train and equip Area Volunteer Trainer.
6.  Provide ESGR training materials, resources and assistance as needed.\*
7.  Promote and assist the leadership with volunteer training activities.
8.  Monitor Area's progress and maintain regular contact.
9.  Report results of visits/contacts to the Committee or Area Chair.
10.  Conduct volunteer training as required.

\*At a minimum, ensure each area has:

- Fact Sheet # 1 (Employer Support of the Guard and Reserve (ESGR))
- Fact Sheet # 2 (Uniformed Services Employment and Reemployment Rights Act (USERRA))
- Fact Sheet # 3 (Tips for Employers)
- Fact Sheet # 4 (Tips for National Guard & Reserve Members)
- Fact Sheet # 5 (Become an ESGR Volunteer)
- ESGR/USERRA Pocket Cards (enough for each assigned volunteer - plus extras)

ENCLOSURE 20

TRAINER PREPARATION CHECKLIST

1. General. For the inexperienced trainer the time spent on this phase is much greater than for the experienced trainer. As a general rule, the inexperienced trainer probably needs to spend at least three hours of preparation for every hour's presentation. Although the ratio of preparation time to presentation time may drop for the experienced trainer, it still should be carried out. Complacency is a bigger threat than inexperience, and trainees are less tolerant of this than inexperience. If advice can be given on preparation, error on the side of over-rather than under-preparation.

2. To help the Volunteer Trainer ensure that all of the details have been taken care of, it is useful to prepare a "trainer checklist." A simple checklist is outlined below.

Training Course/Objective:  
Date/Time:  
Location:  
Mentee Name:

Number of Volunteer Trainees:  
Number of Rooms:  
Trainer(s):  
Mentor Name:

ITEM/TASK	REQ	DONE	COMMENTS	ITEM/TASK	REQ	DONE	COMMENTS
<b>Joining Instructions</b>				<b>Training Room</b>			
Map				Layout			
Volunteer Trainee roster				Refreshments			
Training Outline							
Transportation req'mnts				<b>Materials for Trainees</b>			
				Advance materials			
<b>Meals</b>				Name tags/cards			
Times							
Menus				<b>Materials for Trainees</b>			
Coffee/soda breaks				Advance materials			
				Name tags/cards			
<b>Lodging reservations</b>				Pencils			
Volunteer Trainees				Paper			
Guest speaker				Books			
				Hole punch			
<b>Training Materials</b>				Folders			
Handouts				Clipboards			
Exercise materials				Course materials			
Films, videos, Vds, etc.				Course certificates			
				Photos, Gifts			
<b>Visual Aids</b>							
Screen				<b>Trainer Materials</b>			
Projector / TV VHS				Handouts			
Laptop computer				Lesson Plan/Training Outline			
Demonstration/practice equipment				Visuals			
Flip charts				Master copies			
Pads / Easels				Personal materials			
Pens							
Masking tape				<b>Course Evaluation Forms</b>			
Other AV devices							
Extension cords/cables				<b>Other</b>			

ENCLOSURE 21

TRAIN-THE-TRAINER CHECKLIST

1. General. “Train-the-Trainer” is the cornerstone of an effective ESGR Committee training program. Highlighting training and leadership by example, ensures success by investing in the future of our volunteers. Trainers must demonstrate task proficiency before training others.

2. Responsibility. Field Committee (FC) Chairs have the responsibility to ensure that trainers are thoroughly prepared to conduct the training to train volunteer members. CTDs have the responsibility to carry out the “Train-the-Trainer” and Committee Training Program for the Committee Chair.

3. Purpose. This checklist outlines the policy, process, and procedures for conducting an effective Train-the-Trainer program.

4. Seven-Step Training Process:

- Set objectives for training.
- Plan resources (personnel, time, funds, facilities, devices, materials, training aids).
- Train-the-Trainers.
- Provide resources.
- Assess risk and safety considerations.
- Conduct training.
- Evaluate results based on the objectives.

5. Trainer Preparation Checklist:

a. Prepare yourself:

- Know how to perform the task being trained.
- Rehearse training.
- Back-brief leadership on your training plan and get their feedback.

b. Know how to train others to perform the tasks:

- Ensure that training is performance oriented (evaluated on ability to perform the task).
- Conduct yourself in a confident manner.
- Accurately answer your volunteer’s questions.
- Train an assistant volunteer trainer who can conduct the training to standard in your absence.

c. Know how to set up and conduct an After Action Report (AAR).

d. Prepare the resources:

- Identify and request training materials, supplies, equipment, etc.
- Get equipment and materials before rehearsal.

- Operate the equipment to become familiar with it.
  - e. Ensure that training support personnel, (if required):
    - Understand their support roles.
    - Know their roles as evaluators.
    - Equip and prepare to perform the tasks to standard.
    - Conduct site reconnaissance and rehearsals.
  - f. Prepare the volunteer:
    - Identify the individuals to be trained.
    - Evaluate levels of training proficiency.
    - Train any prerequisite tasks or skills first.
    - Motivate the volunteers. Tell them why the task is important, how it supports their job position, and how it relates to the Committee and the ESGR mission.
  - g. Conduct rehearsals to:
    - Verify trainer task proficiency.
    - Identify any weak points in the training presentation.
    - Coach the trainer on effective training techniques.
    - Determine how the trainer will evaluate volunteer performance.
    - Have the trainer demonstrate evaluation procedures.
    - Promote trainer confidence.
    - Verify trainer ability to conduct AARs.
  - h. Ensure appropriate use of the training outline and evaluation outline:
    - Whenever possible, use a published training outline and evaluation outline.
    - If necessary, develop a training outline yourself.
    - Use the training outline and evaluation outline to guide, individual and leader training.
    - Use the training outline and evaluation outline to specify training objectives.
6. Preparation for Training:
- a. Select training tasks:
    - Identify and select the training task(s) to be trained from the Committee Goals/Objectives and the needs of the Committee and/or volunteers.
  - b. Plan the training:
    - “Who” – Identify the volunteers, mission coordinators, mission functional areas to be trained.
    - “What”
      - (1) Specify the training objectives and the type of training event.
      - (2) Link the training objectives to the Committee Goals with specific collective, leader and individual tasks.
    - “When”
      - (1) Specify the sequence of the training tasks and events.

- (2) Consider whether you are training new volunteers, newly assigned volunteers in a specific functional area, or retraining volunteers.
  - “Where” – Coordinate with training site to identify all arrangements
  - Back brief the FC Chair and/or CTD on the training to be conducted.
    - (1) Provide detailed brief on training objectives, training plan, support requirements, and timelines.
    - (2) Provide an initial risk and safety assessment for the benefit of the volunteer members.
- c. Train-the-Trainer:
  - Identify trainers, leaders, volunteers, and evaluators if required, to be trained.
  - Prepare trainers, leaders, to evaluate the training.
  - Allocate required amount of time to train the volunteers.
  - Conduct the training.
  - Evaluate the training.
- d. Confirm the training site:
  - Investigate options for location of training site.
  - Conduct required preparatory training for volunteers.
- e. Conduct risk and/or safety assessment:
  - Ensure the volunteers are free from risk, danger, or hazard from travel conditions, and/or training site conditions.
- f. Issue the training plan:
  - Clearly identify the responsibilities for the conduct of training.
  - Brief the training plan as clearly as possible to the volunteers in order to ensure understanding.
- g. Rehearse:
  - Conduct rehearsals for trainers, leaders, and evaluators.
  - Allocate time to conduct the rehearsal training.
- h. Conduct pre-execution checks:
  - Continue informal planning and detailed coordination until the training is conducted.
  - Continue coordination for the training through Committee meetings.
  - Include preparation of volunteers to be trained, trainers who will execute and evaluate the training, and the training support that is required.
  - Ensure all planning and prerequisite training for leaders and volunteers is conducted prior to the execution of training.
  - Provide attention to detail needed to use resources efficiently and effectively.
- 7. Trainer’s Responsibilities:
  - a. Identify individual volunteer training requirements:

- The Volunteer Trainer determines which tasks the volunteers need to be trained on using the FC Chair's training strategy and Committee's needs.
- Sources for helping the volunteer trainer define the training needed:
  - (1) Committee's Goals/Objectives
  - (2) Committee Volunteer Training Plan
  - (3) Committee Standardized Job Descriptions
  - (4) Standardized Volunteer Task Training Objectives
  
- b. Plan the training:
  - Training for specific tasks usually must be a planned event, such as Committee or Regional/Area training events, conferences, and/or Regional Training Conferences.
  - Allow for a minimum of 90-day advance notice for training.
  
- c. Gather the training references and materials:
  - The Standardized Task Training Objectives lists all training and evaluation standards and training materials/resources.
  - Additional training references may be used at the discretion of the CTD.
  
- d. Determine the risk assessment and identify safety concerns (if applicable):
  - Analyze the risk involved in training a specific task under the conditions current at the time you are scheduled to train.
  - Ensure that your training preparation takes into consideration the cautions, warnings, and dangers associated with each training task.
  - Pay particular attention to the weather conditions for volunteer travel to and from the training site.
  
- e. Train each volunteer:
  - Teach/train each volunteer to perform the task to standard.
  - Explain step-by-step how to do the task.
  - Give each volunteer an opportunity to do the task step-by-step.
  - Use a choice of teaching/training methods:
    - (1) Demonstration
    - (2) Briefing
    - (3) Conference
    - (4) Discussion
    - (5) Role Play
    - (6) Case Study
    - (7) Distributed Learning
    - (8) Lecture
  
- f. Check each volunteer:
  - Evaluate how well each volunteer performs the task.
  - Conduct these evaluations during individual training sessions or while evaluating individual volunteer proficiency during the performance of the task.
  - The Standardized Task Training Objectives provide an evaluation guide for each task to enhance the volunteer trainer's ability to conduct training.

- Refer to the ESGR Training Strategy to determine how often you should train the volunteer to make sure they maintain proficiency.
  
- g. Evaluate the results:
  - Use the evaluation standards found in the Committee's Training Objective List to make either a subjective or objective determination of the volunteer's level of task proficiency.
  - After evaluation, the Volunteer Trainer should record the results on the Committee Volunteer Tracking Matrix.
  
- h. Retrain and evaluate:
  - Work with each volunteer until the volunteer can perform the task to prescribed standards.
  - Well-planned training, conducted to standard, and properly evaluated, increases the professional competence and confidence of the volunteer, and contributes to the overall ability of the Committee to accomplish its mission.
  - The Volunteer Trainer is a vital link in the conduct of training.

ENCLOSURE 22

ADDITIONAL TRAINING RESOURCES

The following documents, forms, and checklists are available for use on ESGRNet under Library: Training:

- ESGR Volunteer Training Procedure Guide
- Train-the-Trainer Planning Calendar Checklist
- Training Management Timeline and Flow Chart
- Training Management Process Planning Calendar Example
- Part I, NCESGR 5-Year Planning Calendar Example
- Part II, FC Short-Range 1-Year Planning Calendar Example
- Part III, FC 2-Year Calendar Example
- Volunteer Training Letter-of-Introduction Example
- Volunteer Training Thank-You Letter Example

GLOSSARY

ABBREVIATIONS AND ACRONYMS

AAR	After Action Review
APSS	Assistant Program Support Specialist
CTD	Committee Training Director
ESGR	Employer Support of the Guard and Reserve
FC	Field Committee
GWOT	Global War on Terrorism
NCESGR	National Committee for Employer Support of the Guard and Reserve
PEPRS	Planning & Execution Performance Reporting System
PSS	Program Support Specialist
RLC	Region Leadership Conference
ROI	Return on Investment
SOP	Standard Operating Procedure
TBD	To Be Determined
TO	Training Outline
TSC	Training Subcommittee
USERRA	Uniformed Services Employment Reemployment Rights Act