

**Curriculum & Training Plan: USBG Volunteer
Program**

**Statement of Work (SOW)
Architect of the Capitol (AOC)**

U.S. Botanic Garden



CONTENTS

1.0	PROJECT TITLE.....	1
2.0	BACKGROUND	1
3.0	SCOPE OF WORK	2
4.0	TASKS	3
4.1	Develop training goals and learning objectives	3
4.2	Design framework for volunteer training	3
4.3	Develop instructional materials for pre-service training package	3
4.3.1	Option 1 – Develop public engagement volunteer training materials	3
4.3.2	Option 2 – Develop horticulture volunteer training materials	4
4.3.3	Option 3 – Develop docent training materials	4
4.4	Coordinate program implementation	4
4.5	Create evaluation plan.....	4
4.5.1	Option 4 - Implement evaluation plan	4
5.0	DELIVERABLES AND DELIVERY SCHEDULE	5
5.1	Kick-Off Meeting.....	5
5.2	Project Management Plan	5
5.3	Monthly Status Report and As-needed Check-Ins.....	5
5.4	Scope and Sequence Report.....	5
5.5	Instructional Materials Pre-service Training Package	5
5.5.1	Public Engagement Volunteer Training Package (Option 1)	5
5.5.2	Horticulture Volunteer Training Package (Option 2)	6
5.5.3	Docent Training Package (Option 3)	6
5.6	Implementation Plan	6
5.7	Evaluation Plan	6
5.7.1	Yearly Evaluation Reports (Option 4)	6
	Instructional Materials Pre-service Training Package	8
	Public Engagement Volunteer Training Package (Option 1)	8
	Horticulture Volunteer Training Package (Option 2)	8
	Docent Training Package (Option 3)	8
	Implementation Plan	8
	Evaluation Plan	8
5.8	Delivery Instructions.....	8
6.0	GOVERNMENT FURNISHED EQUIPMENT / PROPERTY (GFE/GFP).....	9
7.0	CONTRACT TYPE	9
8.0	PERIOD OF PERFORMANCE	9
9.0	PLACE OF PERFORMANCE / HOURS OF OPERATIONS	9
10.0	OTHER DIRECT COSTS (ODC).....	9
11.0	TRAVEL.....	9
12.0	KEY PERSONNEL	10

12.1	Instructional Designer	10
12.2	Substitution of Key Personnel	11
13.0	PERSONAL SERVICES.....	11
14.0	SECURITY	11
15.0	SAFETY.....	11
16.0	ENERGY EFFICIENCY / COMPLIANCE.....	12
17.0	POINTS OF CONTACT	12
APPENDIX A -	ACRONYMS.....	12
APPENDIX B	13
1.0	EVALUATION OF VOLUNTEER TRAINING (EXECUTIVE SUMMARY)	13
2.0	UNPACKING OUR VISION OF QUALITY PROGRAMS	13

1.0 PROJECT TITLE

Curriculum & Training Plan: USBG Volunteer Program

2.0 BACKGROUND

Steeped in history, rich with tradition, the United States Botanic Garden is a living plant museum that informs visitors about the importance, and often irreplaceable value, of plants to the well-being of humans and to earth's fragile ecosystems. Established by the U.S. Congress in 1820, the USBG is the oldest continuously operating botanic garden in the United States. The USBG was formally placed under the jurisdiction of the Joint Committee on the Library of Congress in 1856 and has been administered through the Architect of the Capitol since 1934. Today, the USBG cares for a permanent collection of plants for education and conservation and provides exhibits and educational programs to the U.S. Congress and public.

The USBG volunteer program is over 30 years old. As of November 2022, there are over 150 volunteers supporting all aspects of the mission. Volunteers assist with plant care, facilitate public programs, and provide visitor services. Through the volunteer program we leverage limited employee time to have maximum impact on the visitor experience and garden health. Volunteers are at least 18 years of age; late high school or college age interns sometimes join the Garden through the volunteer program. The volunteer program was paused due to the COVID-19 pandemic in March 2020. A pilot program for volunteer return began in July 2021, and volunteers continue to return to work in stages.

Examples of volunteer assignments at the USBG include:

- Assist with horticultural operations
- Give accurate and engaging tours of the Garden
- Welcome visitors to the Garden
- Support educational programming
- Lead informal plant science engagement opportunities

Formal volunteer training teaches trainees botanical content, Garden policies and procedures, volunteer program policies, and visitor engagement techniques. In addition, many volunteers participate in informal, on-the-job training. We seek to provide our volunteers opportunities for continued learning, personal satisfaction, and community participation.

Formal trainings vary in several ways including required frequency, length, content, and availability. They are mostly facilitated by USBG employees, with occasional contractor support. Formal trainings include, but are not limited to:

- Pre-service
 - Volunteer orientations attended once by each volunteer; currently offered as an e-learning module
- In-service

- Discovery Cart Facilitator; interpretive content and technique instruction; 2-3 trainings offered quarterly
- New docent training; one course per year, length and timing varies
- Docent continuing education (covers a wide range including basic plant science information, museum education techniques, and content specific to particular areas of the Garden); timing varies
- General accessibility training; timing varies
- Refresher training as volunteers return on site; timing varies

Before the COVID-19 pandemic, all trainings occurred in-person at the USBG. Beginning in 2021, the USBG began offering hybrid training experiences with material shared through Zoom sessions that was supported by onsite shadowing and walk-throughs.

From September 2020 to January 2021, the United States Botanic Garden (USBG) evaluated its volunteer training program to better serve Garden volunteers and employees. This evaluation delivered a detailed report with recommendations, a horizon scan of training at comparable organizations, and a short summary of adult learning best practices. The report executive summary is attached in the appendices.

Report recommendations include:

1. Update training content to better align with required knowledge and skills.
2. Redesign training experience elements to respond to diversity, accessibility, and inclusion best practices.
3. Continue building a culture of lifelong learning.
4. Expand volunteer responsibilities to address growth desires and institutional needs.

3.0 SCOPE OF WORK

The USBG has a need for a contractor to lead a collaborative effort with USBG employees to redesign the USBG volunteer training program, including pre-service training for new volunteers and ongoing, in-service training for active volunteers. USBG employees shall serve as subject matter experts (SMEs) during the redesign process, providing expert content knowledge and institutional awareness.

The objective is to create a flexible learning ecosystem and a culture of continuous professional learning to support the growth and development of the USBG volunteer program. The revised volunteer training program design shall reflect diversity, accessibility, and inclusion best practices.

Areas for special attention include but are not limited to:

1. Closing learning gaps identified by the evaluation of the existing volunteer training program, included as an appendix

2. Aligning with USBG Quality Programs guidelines, UnPACK (Unique to the USBG, Planned Thoughtfully, All Are Included, Centered on Audience, Knowledge-based), included as an appendix
3. Identifying and structuring opportunities for peer-to-peer learning & mentoring
4. Creating a culture of ongoing volunteer development, potentially using volunteer credentialing and/or continuing education
5. Maximizing the use of e-learning within Better Impact, the existing USBG volunteer management system.

4.0 TASKS

4.1 Develop training goals and learning objectives

Develop concrete overarching training goals and content-specific learning objectives for identified training domains, in consultation with USBG employees and informed by the results and recommendations of the previously completed evaluation of volunteer training.

4.2 Design framework for volunteer training

Design a framework or structure for the USBG volunteer training program, including pre-service training for new volunteers and ongoing, in-service training for active volunteers, addressing the training goals established in 4.1 and other areas for special attention, identified in the scope of work above (3.0). The framework shall include lesson templates to meet the needs of a variety of instructional situations and provide cohesion throughout volunteer training. Considerations include, but are not limited to, types of instructional materials, sequencing and pacing, technology use, and assessment methods.

4.3 Develop instructional materials for pre-service training package

Develop pre-service training package for all pre-service training for new volunteers. Includes updating the existing eLearning module and creation of supplementary activities and materials suggested by tasks 4.1 and 4.2. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG learning management system (LMS), Better Impact.

4.3.1 Option 1 – Develop public engagement volunteer training materials

In addition to developing the instructional materials for the pre-service training package, the contractor may optionally develop the in-service training package for public engagement volunteers. This includes Garden Ambassadors (visitor services), Discovery Cart Volunteers (informal science education) and program support volunteers. This does not include docent training, which is addressed in a later option.

Training package shall include activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG LMS, Better Impact.

4.3.2 Option 2 – Develop horticulture volunteer training materials

In addition to developing the instructional materials for the pre-service training package, the contractor may optionally develop a training package for horticulture volunteers. This includes volunteers working with three horticulture teams in a variety of roles. Currently, all horticulture training is informal, on-the-job training.

Training package shall include activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG LMS, Better Impact.

4.3.3 Option 3 – Develop docent training materials

In addition to developing the instructional materials for the pre-service training package, the contractor may optionally develop the training package for docent training. Because Docent training requires robust LMS features not currently available in Better Impact, this option shall include a proposal for selecting an appropriate LMS.

Docent training shall include but is not limited to coverage of the Conservatory, Gated Outdoor Garden, Bartholdi Found & Gardens, and continuing education. Training package shall include activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated into the selected LMS.

4.4 Coordinate program implementation

Present the updated volunteer training program design and proposed implementation timeline to internal USBG audiences. Lead train-the-trainer sessions to ensure USBG employees and other system users are familiar with the resources and methods they will use when implementing the training program.

4.5 Create evaluation plan

Develop a plan to evaluate the volunteer training program, reflective of organizational goals and USBG Quality Program guidelines (UnPACK). Evaluation plan shall include metrics of volunteer satisfaction with the training, learning outcomes following training, utility of the training program for supporting volunteers in performing their roles, and utility of the training program for accomplishing organizational goals.

4.5.1 Option 4 - Implement evaluation plan

In addition to creating a plan for evaluation (see 4.5), the contractor may optionally lead the evaluation of the training program. The purpose of this activity is to monitor and evaluate the USBG's progress towards meeting overarching training goals, content-specific learning objectives, and other organizational objectives outlined throughout project.

5.0 DELIVERABLES AND DELIVERY SCHEDULE

5.1 Kick-Off Meeting

The contractor shall lead a kick-off meeting within fourteen (14) days after contract award, to include an overview of the project team, scope of work, deliverables, transition activities, communication approach, initial risks, and next steps.

5.2 Project Management Plan

The contractor shall submit a Project Management Plan 30 days after award that outlines the project execution and project control approach, roles, responsibilities, cost, schedule, and scope. The plan shall be used to facilitate key decision points, milestones, and communication among key stakeholders.

5.3 Monthly Status Report and As-needed Check-Ins

The contractor shall prepare a monthly status report and attend as-needed check-ins. The intended audience includes Garden stakeholders and the Contracting Officer's Representative (COR). Status reports are due by 12:00 PM Eastern Time on the last Friday of the month. The status report shall include:

- Accomplishments - Description of work accomplished
- Planned Activities and Needs - Work planned for the following two weeks that require Garden employees and resources
- Open Issues - Outstanding issues and risks to including remediation plan

5.4 Scope and Sequence Report

Report detailing the proposed scope and sequence for the volunteer training program at the USBG. This report shall include overarching training goals and content-specific learning objectives as described in Task 5.1. It shall also include the framework for volunteer training described in Task 5.2 and lesson templates for volunteer training. Delivery timeline shall be determined upon award of contract.

5.5 Instructional Materials Pre-service Training Package

All instructional materials needed for implementation of the pre-service training package for all new volunteers shall be organized and submitted to the USBG. Includes activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG LMS, Better Impact. Delivery timeline shall be determined upon award of contract.

5.5.1 Public Engagement Volunteer Training Package (Option 1)

All instructional materials needed for implementation of the public engagement volunteer training package shall be organized and submitted for USBG review. Includes activities and materials for teaching and learning, to be implemented through a combination in-person and

online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG LMS, Better Impact. Delivery timeline shall be determined upon exercise of option.

5.5.2 Horticulture Volunteer Training Package (Option 2)

All instructional materials needed for implementation of the horticulture volunteer training package shall be organized and submitted to the USBG. Includes activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated in the USBG LMS, Better Impact. Delivery timeline shall be determined upon exercise of option.

5.5.3 Docent Training Package (Option 3)

All instructional materials needed for implementation of the docent volunteer training package shall be organized and submitted to the USBG. Includes activities and materials for teaching and learning, to be implemented through a combination of in-person and online instruction. All materials shall meet content-specific learning objectives and where applicable be integrated into the selected LMS.

5.6 Implementation Plan

This plan shall include an overview of the updated volunteer training program design and proposed timeline for implementation. It shall include leading train-the-trainer sessions to ensure USBG employees and other system users are familiar with the resources and methods they will use throughout the redesigned training. Delivery timeline shall be determined upon award of contract.

5.7 Evaluation Plan

This plan shall detail both the formative and summative evaluation for learners and for the success of the instructional design. The evaluation plan shall reflect USBG Quality Program guidelines (UnPACK) and shall include metrics of volunteer satisfaction with the training, learning outcomes following training, utility of the training program for supporting volunteers in performing their roles, and utility of the training program for accomplishing organizational goals. Delivery timeline shall be determined upon award of contract.

5.7.1 Yearly Evaluation Reports (Option 4)

These reports shall describe the USBG's progress towards meeting overarching training goals, content-specific learning objectives, and other organizational objectives outlined throughout project. Two reports shall describe such progress within the first two years of project implementation. Delivery timeline shall be determined upon exercise of option.

Table 1 Deliverables

Deliverable/Description	Type	Delivery Method(s)	Delivery Date/Frequency
Kick Off	Meeting	Online	Within fourteen (14) days after award of contract
Project Management Plan	Document (Microsoft Word or PDF)	Email	Within 30 days after award of contract
Monthly Status Report	Document (Microsoft Word or PDF)	Email	Monthly after award of contract; specific schedule TBD
Check-Ins	Meeting	Online	Monthly after award of contract (as needed); specific schedule TBD
Scope and Sequence Report	Document (Microsoft Word or PDF)	Email/Dropbox	To be determined upon award of contract

Deliverable/Description	Type	Delivery Method(s)	Delivery Date/Frequency
Instructional Materials Pre-service Training Package	Folder/Package	Email/Dropbox	To be determined upon award of contract
Public Engagement Volunteer Training Package (Option 1)	Folder/Package	Email/Dropbox	To be determined upon exercise of option
Horticulture Volunteer Training Package (Option 2)	Folder/Package	Email/Dropbox	To be determined upon exercise of option
Docent Training Package (Option 3)	Folder/Package	Email/Dropbox	To be determined upon exercise of option
Implementation Plan	Document (Microsoft Word or PDF)	Email/Dropbox	To be determined upon award of contract
Evaluation Plan	Document (Microsoft Word or PDF)	Email/Dropbox	To be determined upon award of contract
Yearly Evaluation Reports (Option 4)	Document (Microsoft Word or PDF)	Email/Dropbox	To be determined upon exercise of option

5.8 Delivery Instructions

The contractor shall provide electronic copies of the preaward and postaward documentation for review, approval, and appropriate action. Electronic copies shall be delivered via email attachment to the CO and COR as appropriate. The electronic copies shall be compatible with Microsoft Office 2016, Microsoft 365, Adobe PDF, or other applications as appropriate and mutually agreed to by the parties. The contractor shall follow the invoicing instructions outlined in the contract to submit their invoices.

Once created, deliverables and work products are considered the property of the Federal Government. The deliverables shall be considered final upon receiving Government approval. The Government shall provide written notification of acceptance or rejection of all deliverables, with the exception of invoicing, within fourteen (14) days of receipt. Approval or rejection of invoicing is within 30 days. All notifications of rejection will be accompanied with an

explanation of the specific deficiencies causing the rejection. Items must be approved by the CO and COR to be considered “accepted.”

Deliverables shall be deemed acceptable if the document adequately covers all required topics, meets general quality measures, and is professionally prepared in terms of accuracy, clarity, format, and timeliness. Quality measures, as set forth below, shall be applied to each work product received from the contractor.

- **Accuracy:** Documents shall be accurate in presentation, content, and style;
- **Clarity:** Documents shall be clear and concise;
- **File Editing:** Documents shall be editable by the government;
- **Format:** Documents shall be transmitted via mutually agreed upon media; and
- **Timeliness:** Documents shall be submitted on or before scheduled due date.

6.0 GOVERNMENT FURNISHED EQUIPMENT / PROPERTY (GFE/GFP)

Contractor will provide all items required for successful completion of contract. All training materials, policies, and procedures generated as a result of this requirement becomes the property of AOC.

7.0 CONTRACT TYPE

It is anticipated that this contract will be awarded to a small business on a Firm-Fixed Price basis. Awardee will be evaluated using a trade-off method to attain the best-value to the Government (see Technical Evaluation Plan).

8.0 PERIOD OF PERFORMANCE

The period of performance of this project for the base contract begins no later than February 30, 2023 and is anticipated to be completed by July 31, 2024. Contract may include up to 4 additional years to exercise Options 1 through 4.

9.0 PLACE OF PERFORMANCE / HOURS OF OPERATIONS

It is expected that the project will begin entirely remotely and that much of the work shall be completed at the awardee’s location. Some onsite work may be advised for key meetings, working groups, and a complete understanding of organizational capacity.

10.0 OTHER DIRECT COSTS (ODC)

Other direct costs such as training, materials, etc. are not authorized under this requirement.

11.0 TRAVEL

Any travel costs anticipated to be incurred during onsite work shall be included in the bid document. Those costs shall include, but are not limited to, origination, destination, number of trips, number of persons, and a breakdown of lodging, meals, transportation, and related costs.

Costs for transportation, lodging, meals, and incidental expenses incurred by the contractor on official company business are allowable and are subject to FAR 31.205-46, Travel Costs. These costs will be considered to be reasonable and allowable only to the extent that they do not exceed on a daily basis the maximum per diem rates in effect at the time of travel as set forth in the Federal Travel Regulations (FTR). The contractor will not be reimbursed for travel and per diem within a 50-mile radius of the worksite where a contractor has an office. A worksite is the same as a contractor's place of performance location. All travel outside of the Washington Metropolitan area must be approved by the COR in advance. No travel will be reimbursed without prior approval from the COR. If the contractor is required to travel outside of the Washington Metropolitan area, the contractor shall provide the COR with a completed Request for Travel Authorization Form at least 10 calendar days prior to the requested travel date. The contractor shall not incur costs in excess of the funded value of the travel CLIN, without prior written approval from the Contracting Officer.

12.0 KEY PERSONNEL

The Government has identified the need for one (1) key personnel under this requirement. The contractor shall propose an Instructional Designer (ID) who meets the required skills outlined below. In addition, the government has identified skills and qualifications needed to complete this project. Proposal shall demonstrate the ability of the contractor to fill the needed skills and qualifications.

Key personnel must exhibit critical soft skills including:

- Excellent active listening and verbal communication skills;
- Strong business writing ability;
- Flexible and adaptable attitude;
- Can conform to shifting priorities, demands, and timelines;
- Ability to elicit cooperation from a wide variety of stakeholders; and
- Ability to discuss technical issues with non-technical, executive-level government officials.

12.1 Instructional Designer

The Instructional Designer shall have overall responsibility of the contract activities: planning, organizing, directing, controlling, staffing, and reporting status, deliverables, and schedules to the Government. The ID shall be a full-time employee of the prime contractor.

Required Skills/Experience:

- Five (5) or more years of relevant experience in instructional design
- Knowledge of adult learning/instructional theory, including assessment
- Proficiency with learning management systems (LMS)
- Excellent project management and organizational skills

12.2 Substitution of Key Personnel

Key personnel are critical to performance under this requirement. During the period of performance, key personnel shall only be replaced with people of comparable education and experience levels. The contractor shall obtain approval from the Government prior to replacement of any key personnel. The CO shall be notified in writing of any proposed substitution at least 15 calendar days in advance of the proposed substitution.

Additionally, the contractor shall immediately replace any individual under this statement of work who fails to perform their duties adequately, is chronically absent/late, or conducts themselves in a manner that is inconsistent with AOC policies and practices, or engages in practices that are disruptive to the working environment.

13.0 PERSONAL SERVICES

Personal services are not authorized under this requirement.

14.0 SECURITY

The Offeror, if hosting an information system on behalf of the AOC, must conduct either an Assessment and Authorization of their system in accordance with National Institute of Standards 800-Series Special Publications guidance, or conduct independent assessments of their information security controls by a third-party-assessment organization using industry standard metrics and methodologies.

The Offeror shall ensure that its IT-related products or services comply with AOC policies, standards and guidelines, including AOC Order 7-4, IT Security. Personnel with AOC system accounts responsible for rendering the Offeror's services shall be subject to the same security requirements as AOC employees including but not limited to rules of behavior and computer security awareness training.

15.0 SAFETY

The contractor shall comply with all AOC safety policies and shall require all employees to wear appropriate clothing apparel for the assigned tasks. No sandals or any style of open toe shoes shall be allowed for any position that requires lifting of 5lbs or greater as this would pose a risk of injury.

Consistent with the Center for Disease Control (CDC) and Office of Attending Physician (OAP) recommendations, the Architect of the Capitol (AOC) is requiring the following:

- 1) Contractor shall follow CDC guidance, appropriate for their industry, for cleaning, disinfection, health screening, and quarantine/isolation of sick employees.
- 2) Contract workers shall not report to work on-site if diagnosed with, have been exposed to, and/or display symptoms of COVID-19.
- 3) Contractor shall conduct contact tracing, per CDC guidance, for all employees sick with pandemic illnesses.
- 4) Contractor shall report cases of suspected pandemic illness to the COTR within one day of discovery, and the result of any medical diagnosis (such as a test result) of any case of pandemic illness within one day of discovery.

- 5) Contractor shall maintain confidentiality of personal information for sick employees and assign a unique identifier to AOC for reporting purposes.
- 6) Contractor shall report quarantined and recovering employees returning to work 2 business days prior to their return.
- 7) Contractor shall notify COTR of any identified risk contacts of USBG or other AOC employees, within one day of discovering a positive case.

During this pandemic, everyone will continue doing their utmost to protect the health and lives of employees and contractors by following the guidance of the CDC and OAP, which is evolving as they learn more about the virus and the disease it causes. For the safety of contractor and staff, the AOC is requesting all personnel wear face coverings while on campus, and in public spaces, as an enhancement to social distancing and personal hygiene practices. The AOC is requesting that every contract worker endeavor to comply with these guidelines until further notice.

16.0 ENERGY EFFICIENCY / COMPLIANCE

There are no special energy efficiency requirements. The contractor shall minimize energy use while on Government site.

17.0 POINTS OF CONTACT

Contracting Officer

Lance D. Farthing,
Contracting Officer
Lance.Farthing@aoc.gov
202.226.1948

Contracting Officer Representative

Elizabeth Barton
Volunteer Coordinator & Education Specialist
Elizabeth.Barton@aoc.gov
202.731.7984

APPENDIX A - **ACRONYMS**


AOC	Architect of the Capitol
CO	Contracting Officer
COR	Contracting Officer's Representative
GFE	Government Furnished Equipment
ID	Instructional Designer
LMS	Learning Management System
ODC	Other Direct Costs

POC	Point of Contact
POP	Period of Performance
SME	Subject Matter Expert
SOP	Standard Operating Procedure
SOW	Statement of Work
UnPACK	Unique to the USBG, Planned Thoughtfully, All Are Included, Centered on Audience, Knowledge-Based
USBG	United States Botanic Garden

APPENDIX B – SUPPORTING DOCUMENTS

1.0 EVALUATION OF VOLUNTEER TRAINING (EXECUTIVE SUMMARY)

2.0 UNPACKING OUR VISION OF QUALITY PROGRAMS



**U.S. Botanic Garden
Evaluation of Volunteer
Training**

EXECUTIVE SUMMARY

Executive Summary: Investigative Threads

The United States Botanic Garden conducted an evaluation of its volunteer training program in an effort to better serve Garden volunteers and employees. The evaluation ran from September 2020 to January 2021 and was conducted by Elory Rozner of Uncommon Classrooms. The evaluation focused on three investigative questions, all of which sought to establish alignment between current training content/practices and internal and external metrics.

Investigative Thread 1:

In what way(s) does the training experience prepare volunteers to do their job?

Sub-questions explored volunteer confidence, USBG staff perception of volunteer preparedness, the role training played in confidence and preparedness, and alignment between training content and the knowledge and skills volunteers need on the job.

We employed volunteer focus groups, employee focus groups, employee interviews, and a survey to collect data to answer this question.

Investigative Thread 2:

In what way(s) does the training experience reflect diversity, accessibility, and inclusion best practices?

We looked at this question from the volunteer perspective only—not from the visitor perspective—and focused on training content, modalities, and logistics.

We employed volunteer focus groups and a survey to collect data to answer this question. We also conducted a horizon scan of five peer organizations, which generated additional data for this thread.

Investigative Thread 3:

In what way(s) does the training experience reflect adult learning best practices?

We researched and developed a high-level brief on adult learning, and then compared findings on best practices to current USBG volunteer training approaches.

Investigative Thread 1

In what way(s) does the training experience prepare volunteers to do their job?

Investigative Thread 1 sought to understand how well the current training content prepared volunteers to do their job. We unpacked this investigative thread into four sub-threads: volunteer confidence, volunteer preparedness, role of training in volunteer confidence and preparedness, and content alignment, each with their own finding.

For this thread, we collected data through employee interviews, employee focus groups, volunteer focus groups, and a volunteer survey.

What did we learn?

Finding 1: Volunteers feel confident they possess the knowledge and skills required for their job.

How do volunteers feel on the job? Are they confident in their role? Do they feel they possess the knowledge and skills required to do their job?

To answer these questions, we surveyed volunteers and asked them to submit a rating on a scale. We supported the quantitative results with qualitative data gathered during focus groups. The survey revealed that a large majority of volunteers (90%) feel “highly confident” they possess the knowledge and skills required to do their job. They feel *most comfortable* with two specific aspects of their job: 1) helping visitors find their way in/through the Garden, and 2) interpreting content for visitors. They feel *least comfortable* responding to safety concerns—handling emergencies, keeping visitors and themselves safe, and understanding their role in safekeeping. (Please see Detailed Findings for breakdowns by volunteer type.)

We expected to find that long-standing volunteers feel highly confident on the job. We did not expect that (much) newer volunteers would report the same levels of confidence. We recommend further investigation to understand the nature, source, and validity of the confidence among newer volunteers.

In focus groups, volunteers shared areas where they lack confidence on the job. Some volunteers hope to achieve greater mastery of administrative tasks (for example, at the front desk) and safety protocol, and several volunteers cited a never-ending need or desire to acquire more plant knowledge.

This finding was entirely subjective—focused on how volunteers felt—and didn’t include assessment of volunteers by one another or employees.

Investigative Thread 1

In what way(s) does the training experience prepare volunteers to do their job?

Finding 2: Employees feel volunteers are prepared to fulfill their roles and responsibilities.

Do employees, based on interactions with and observations of volunteers, feel volunteers are prepared on the job?

We included discussion of this question in employee focus groups and one-on-one employee interviews. Overwhelmingly, employees feel volunteers are prepared to fulfill their roles and responsibilities. Employees cited different types of volunteer preparedness including punctuality, understanding roles and responsibilities, and possessing or being able to learn required knowledge and skills. Many employees consider willingness to learn, rather than any specific skills or knowledge, to be the most important characteristic of volunteers; they say volunteers regularly demonstrate this characteristic.

In the original evaluation framework, we established a target metric of “at least 75% of employees say the training prepared the volunteers to fulfill their role/responsibilities.” Based on employee interview and focus group data analysis, this target was met. In fact, while 100% of employees interviewed said volunteers were prepared, more than 90% of those employees also offered suggestions for volunteer growth.

In that vein, employees shared examples of ways in which volunteers were not as completely prepared for their roles, including occasional instances of docents and discovery cart volunteers sharing inaccurate content with visitors, as well as volunteers using “antiquated facilitation methodologies.” Employees urged volunteers to become more willing to say “I don’t know” in response to visitors’ questions, rather than answering with incorrect or uncertain information. They also stressed the need for volunteers to diversify tours based on different audience needs and interests, and for volunteers to apply interpretive practices and messaging that align with the new interpretive master plan. Finally, employees spoke of some volunteers who are less willing to take direction, which is a problem in horticulture, as gardeners have specific techniques that need to be followed.

They “come to the garden ready to be a welcoming presence, smiling at people, greeting people...happy to answer questions.”

They “have real commitment to customer service.”

They “need to develop confidence to say ‘I don’t know,’ to know the limits of their knowledge and not fill in random things that aren’t accurate.”

“Some volunteers show a narrow perception of the world and don’t engage the world broadly; considering our location, this is not acceptable.”

Investigative Thread 1

In what way(s) does the training experience prepare volunteers to do their job?

Finding 3: Training played an integral role in developing volunteer confidence and preparing volunteers to fulfill their roles and responsibilities.

Which learning inputs most greatly impact volunteer confidence and lead to volunteer preparedness?

To answer this question, we asked volunteers about the role training and other learning inputs played in building confidence and preparing them for their work. These questions were included in both the survey and in focus group discussions. In addition, we asked about which aspects of training were most effective and/or satisfying.

Volunteers said training had a significant impact on the development of their job-related knowledge and a moderate to significant impact on the development of job-related skills. Across the board, volunteers stressed the value of on-the-job training for skills development. They found working directly with USBG staff to have a larger impact than classroom-based training. The most effective training components for volunteers were experiential: hands-on demonstrations and job shadowing.

In the original evaluation framework, we established a target metric of "at least 75% of volunteers say the training prepared them to fulfill their role/responsibilities." Based on analysis of the survey and focus group data, this target was met. (100% of volunteers in focus groups cited training as a key lever in the development of knowledge or skills, primarily focusing on the on-the-job training vs. formal training.)

Investigative Thread 1

In what way(s) does the training experience prepare volunteers to do their job?

Finding 4: There are gaps between current training content and the knowledge and skills volunteers need to do their job.

Does the current training content align with the knowledge and skills volunteers need to do their job?

To answer this question, we focused on discovering what knowledge and skills are required to fulfill volunteer roles and responsibilities. We investigated this from both the volunteer perspective, in a survey and in focus groups, and the employee perspective, in interviews and focus groups. After generating and organizing the lists of knowledge and skills, we cross-referenced with the current training content.

Our original intention was to determine percentage of alignment based on the cross-referencing. We soon discovered, however, that an accurate quantitative determination would require much more comprehensive data collection and analysis than was in the scope of the study. As a result, we turned our focus away from the target metric and toward the training that emerged as requiring more attention. These training areas, defined by employees in focus groups and interviews and by volunteers in focus groups, include facilitation technique, communication skills, plant care, general "soft skills" essential to serving as a volunteer, and D.C. tourism information. In some cases, this content is present in the current training, which underscores a need for either more robust treatment or a different instructional method for deeper engagement/memory.

Investigative Thread 2

In what way(s) does training content reflect diversity, accessibility, and inclusion best practices?

Investigative Thread 2 sought to understand how well the current training content reflected diversity, accessibility, and inclusion best practices. We unpacked this investigative thread into sub-threads: training content, training modalities, and training logistics.

For this thread, we collected data through volunteer focus groups, a volunteer survey, and a horizon scan of other organizations. For additional best practices comparison, we used our own prior experience as well as guidelines from the Of/By/For All initiative (www.ofbyforall.org).

What did we learn?

Finding 1: Some volunteers don't understand the terminology or concepts in question.

Through survey questions, we gathered a baseline for volunteer engagement in diversity, accessibility, and inclusion work outside of USBG. Most participants (72%) said they have received formal training led by an experienced facilitator. Only 11% of participating volunteers said they had never received any training. Those in-between had done some informal work, including reading relevant material or participating in community discussions.

Despite this reported experience, in focus groups and survey responses some volunteers revealed a lack of understanding of terms and concepts in question. A common example included mixing up the meanings of diversity and inclusion, as well as the meanings of equality and equity. Another example was asking directly, "what exactly is inclusion?" or selecting the option "I don't know what this means" in the survey.

It's important to keep this baseline knowledge and experience in mind when reviewing the other findings and considering the design of new training.

Investigative Thread 2

In what way(s) does training content reflect diversity, accessibility, and inclusion best practices?

Finding 2: Most volunteers feel represented in the training content—but some do not.

Do volunteers feel the training reflects and is inclusive of diverse cultures and identities, and do they themselves feel represented in the training content?

In the volunteer survey, most participants reported that training content was either “very much” or “somewhat” reflective and inclusive of diverse cultures and identities. In addition, most volunteers reported their identities were “very much” represented through training content. In the original evaluation framework, we established a target metric of “at least 75% of volunteers say content is inclusive of diverse identities.” Based on analysis of the survey and focus group data, this target was met; 87% of volunteers reported training content was either “very much so” or “somewhat” inclusive of diverse identities.

However, it is important to pay attention to the respondents who selected “not at all” for this question. While the percentage is small—7% responded “not at all” when asked whether training content was reflective and inclusive of diverse cultures and identifies, and 2% responded “not at all” when asked whether they felt included and represented throughout the training—is reflects an authentic story of some volunteer experiences, and it may be the representative of the very population this evaluation effort seeks to address.

Focus group discussions enforced the survey findings, although they also revealed pain points of exclusion for some volunteers. Three different volunteers cited examples of their unique point of view being requested but not listened to (they are “at the table” yet “not included in the conversation”), not seeing their identities or expressions reflected in the staff or volunteer make-up, and not feeling like an important or valuable asset to the Garden.

Investigative Thread 2

In what way(s) does training content reflect diversity, accessibility, and inclusion best practices?

Finding 3: While some volunteers feel prepared to work with diverse visitors, others do not—and a new training module is warranted.

Did the training prepare volunteers to work with diverse visitors?

In the volunteer survey, 47% of respondents said training prepared them “well” to interact with diverse visitors. Nearly the same percentage (45%) said training prepared them “somewhat” to interact with diverse visitors. Only 7% of respondents felt training did not prepare them to interact with diverse visitors.

In the focus groups, volunteers unanimously discussed the need for cultural competency training. They said there is currently “no nexus between training and how to interact with diverse visitors,” “nothing on how to work with non-English speaking visitors,” and “no training on how to work with people of different cultures or religions.” Volunteers praised the accessibility training but said that it—like any cultural competency training that might get developed—can’t be only a one-time thing and should not be limited to classroom lectures.

When asked what support they might need or want to better interact with diverse visitors, volunteers said they would prefer experiential opportunities, such as demonstrations and discussions, as well as independent work—not formal classroom training.

Finding 4: Volunteers and employees recognize the homogeneity of the volunteer corps and would like to thoughtfully and intentionally diversify to represent the demographics of D.C.

Across conversations with employees and volunteers, participants noted the lack of volunteer diversity (race and age) and a need to change this by diversifying the volunteer corps. Strategy for diversifying was less certain, although several respondents offered strategies that also surfaced in the Horizon Scan: targeted outreach, community partnerships, different approaches to credentialing, and new access points/modes.

Investigative Thread 2

In what way(s) does training content reflect diversity, accessibility, and inclusion best practices?

Finding 5: Most volunteers feel current training modalities are accessible to them, both cognitively and physically.

Do the training modalities meet volunteer learning preferences, and is the training physically accessible to volunteers?

To answer this question, we asked volunteers about their experiences in a survey and in focus groups. In the survey, most respondents said training modalities were “very much” inclusive of their learning preferences. In the focus group, a format that encourages and allows more nuanced responses than a survey does, volunteers requested different modalities that would better suit their learning preferences: more immersion, more learn-by-doing, more shadowing/critique, and more incremental support (vs. one-off trainings).

In the original evaluation framework, we established a target metric of “at least 75% of volunteers say training modalities meet their diverse learning needs/styles.” Based on analysis of the survey and focus group data, this target was met (91% of volunteers reported that training modalities met their learning needs/styles; this includes “very much so” and “somewhat” responses).

In both the survey and focus groups, most volunteers said training was “very much” physically accessible to them.

Finding 6: Some logistics of training are problematic for current volunteers and are presumed to create barriers for potential new volunteers.

Do current logistics prevent full participation by volunteers—and is there a relationship between logistics and corps diversity?

In focus groups, volunteers spoke about barriers to attending trainings due to distance from their home/work to the garden, lack of parking or distance for them to/from a Metro station, and difficulty attending sessions on weekdays due to work commitments. Several volunteers discussed how these barriers will further limit the diversification of the corps. A dominant request was for online training or hybrid training, including flipped models where volunteers could watch videos or read content at home, followed by in person discussion and practice.

Investigative Thread 3

In what way(s) does training content reflect adult learning best practices?

Investigative Thread 3 sought to understand how well the current training reflected best practices in adult learning.

For this thread, we developed a research brief to identify eight best practices and then, using a scale, scored the existing volunteer training approaches against those practices.

What did we learn?

We scored the Garden's existing practices twice: 1) through an internal assessment based on experience with training content, and 2) through analysis of focus group output. The two scores were very closely aligned. In the original evaluation framework, we established a target metric of "training content and modalities are (at least) "moderately" or "sometimes" aligned with defined best practices." Based the scoring, this target was met for six out of the eight best practices.

Finding 1: Existing training reflects one key best practice: it's relevant and solution-oriented.

Training designers are purpose-driven; they have specific knowledge and skills they need volunteers to learn and apply. The volunteers are experiencing the training as intended and feel the content is relevant to their job.

Finding 2: Existing training does not reflect two key best practices; it does not enable learner agency in training design and delivery, and it does not create leveling-up opportunities.

Without using formal academic language, focus group participants revealed an interest in possessing greater agency in their training—having a chance to help develop and deliver training; this interest came from the more experienced volunteers. Focus group participants did not directly ask for leveling-up or micro-credentialing opportunities, but because this is a best practice, the Garden can explore potential pathways.

Executive Summary: Recommendations

Even though many of the target metrics were met, the evaluation generated many suggestions for new practices and processes for volunteer training. The recommendations section outlines action-oriented ways to move forward.

Recommendations

1. Update training content to better align with knowledge and skills volunteers need.

2. Redesign training experience elements to respond to diversity, accessibility, and inclusion best practices.

3. Continue building a culture of lifelong learning.

4. Expand volunteer responsibilities to address growth desires and institutional needs.

And also...

Both volunteers and employees revealed how grateful they were to be part of this evaluation process. They appreciated the opportunity to share their experiences with and ideas for the volunteer training program. In addition to the recommendations listed, the internal team can consider how to operationalize a practice of reflective evaluation.

"I like being able to bounce ideas off of people and fill in gaps in the training—just just like in this conversation."

--USBG volunteer

"This is the first time in a decade we have been asked about the training, to see if it is meeting our needs."

--USBG employee



UnPACKing Our Vision of Quality Programs

We strive for all USBG programs to exemplify each of the five attributes below. We recognize a need for flexibility in how they do so. When planning and reflecting on programs, we consider:

- 1) In what ways does the program exemplify each attribute?
- 2) In which areas does the program especially excel in exemplifying quality?
- 3) In which areas does the program have opportunities to better exemplify quality?

Unique to the USBG

Can look like...

Programs that connect participants to the importance of plants (USBG mission-driven); integrate the USBG's unique resources (e.g., staff expertise, collections); offer one-of-a kind participant experiences

Planned Thoughtfully

Can look like...

Thoughtful choices about program topic, design, logistics, and roles; educational programs (change knowledge, behavior, science identity); impactful programs (transformative, inspiring, surprising, memorable); programs planned with sustainability in mind; programs planned with aesthetics in mind; professionally presented programs

All Are Included

Can look like...

Welcoming and accommodating program content, facilitation, and logistics; programs in which participants feel included, supported, and valued

Centered on Audience

Can look like ...

Programs with a clearly defined audience whose needs, interests, and preferences are considered (and when possible, whose input informs design); that are well-received by the intended audience; that are engaging (entertaining, enjoyable, fun) for the intended audience; that are timely and relevant for the intended audience; that are valuable (personally useful and meaningful) for the intended audience

Knowledge-Based

Can look like...

Ideas and information presented in programs are grounded in current scientific understandings or expertise in the relevant field