**Template**

**Annual Training Plan**

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Outbound Mobility Best Practice Guide for Australian Universities **Annual Training Plan**

**DOE (Your Organization) 200X Annual Training Plan** **Date Approved**

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**DRAFT TEMPLATE**

**Organization Name**

**200X Annual Training Plan**

**Approved by: Name**

**Training Manager/Director Title**

**Organization**

**Date**

**(Note: At a minimum, the organization’s Annual Training Plan is to be approved by the head of the element’s training function. First-tier organizational approval is appropriate as well.)**

**Prepared by: Name**

**Title**

**Organization**

**Date**

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**Introduction**

*A training plan is the cornerstone of the training management process. It defines objectives, sets priorities, plans resource allocations, ensures that training funds are appropriately spent, and evaluates the effectiveness of training programs. It is a “blueprint” for how the organization will set program direction for training activities and manage training resources for a one-to-five-year period.*

*Each DOE Headquarters and field training organization should manage and plan its training program based on the strategic goals of the organization. By developing and implementing a training plan, each DOE element can assure a competent and skilled workforce, accurate training budget forecasting, and analyses and projections for current and future training needs.* Include your organization’s Mission andVision Statements and customer base in the Introduction to your Annual Training Plan.

**Background**

*Prior to preparing the training plan, you would have identified your organization’s operational requirements through a workforce and training needs assessment. Each DOE element must identify annually its critical training needs through organizational analyses and annual review and revision of individual development plans. The training needs assessment provides the foundation for developing an organizational training plan and is the process of identifying performance requirements within an agency and the ‘gap’ between what performance is required and what presently exists.* Describe under Background the type(s) oftraining needs assessment(s) conducted during this cycle; i.e., Individual Development Plans; Occupational Needs Assessment, Organizational Needs Assessment, and/or Customer Satisfaction.

**What to Include in the Training Plan – Eight Needed Elements**

1. *The training plan must contain a section which describes* element critical needsor those immediate training needs which, when met, will be most effective in improving organizational and workforce performance.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **1. Critical/Immediate Training Needs** | | |
| **Critical/Immediate** |  | **Training** | **Explanation/Notes** |
| **Need** |  |  |  |
| A. Briefly describe the |  | List needed training | Source of Data. The critical needs are an |
| organization’s critical needs or |  |  | outcome of an organizational needs |
| those immediate training needs |  |  | assessment. The critical training needs |
| which, when met, will be |  |  | should be identified through the |
| effective in improving |  |  | management validation process, which |
| organizational and workforce |  |  | balances the wants of individuals and |
| performance. These needs are |  |  | priority needs of the organization with |
| typically required at the |  |  | available resources. |
| organizational level and are |  |  |  |
| mission critical. The need for |  |  |  |

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training is typically for

implementation of new

programs or projects or

organizational changes in

priorities.

B.

C.

1. *The training plan must also contain a section which describes your organization’s training goals, objectives, performance measures, and outcomes. The organization’s training goals may or may not remain stable from year to year. Goals may be added, modified, or deleted through an annual review process and should be reassessed based upon known factors that will impact the mission and function of the organization and/or customer needs. Organizational strategic plans may contain the data needed to complete this section.*

*In order to be able to identify effective corrective actions to improve products and services, results of all key goals and objectives must be measured. In this way, specific processes that need to change can be identified when progress is not satisfactory.*

**2. Training Goals, Objectives, Performance Measures and Outcomes**

|  |  |  |  |
| --- | --- | --- | --- |
| **Goals** | **Objectives** | **Performance** | **Outcomes** |
|  |  | **Measures** |  |
| A. A goal is a target | An objective is a | In order to be able to | An outcome is the expected, |
| level of performance | statement of desired | identify effective | desired, or actual result to |
| expressed as a | outcomes for an | corrective actions to | which outputs of activities of |
| tangible, measurable | organization or | improve products and | the organization have an |
| act or action, against | activity. | services, results of all | intended effect. Outcomes |
| which actual |  | goals and objectives must | are generally non-numeric, |
| achievement will be |  | be measured. In this way, | qualitative conditions. |
| compared, including |  | specific processes that |  |
| a goal expressed as a |  | need to change can be |  |
| quantitative |  | identified when progress |  |
| standard, value, or |  | is not satisfactory. Unless |  |
| rate. This is the |  | the measures are firmly |  |
| result that a program |  | connected to results from |  |
| or organization aims |  | a defined process, it is |  |
| to accomplish. |  | difficult to know what |  |
|  |  | corrective actions to take |  |
|  |  | as well as be able to |  |
|  |  | predict with confidence |  |
|  |  | what effects those changes |  |
|  |  | will have. |  |
| B. ***Example****:* A | ***Example****:*A needs | ***Example****:*Employee | ***Example***: The cultural |
| systematic learning | assessment process is | needs (individual and | acceptance within the |
| program exists | used to ensure | occupational), as well as | organization is such that |
| within the | education & training | organizational training | employees willingly generate |
| organization that | are designed to | requirements, are | their own IDPs when needed |
| consists of a cyclical | support the | documented in employee | and supervisor responds to |
| pattern of | organization’s | IDPs. IDPs are updated | the submission. |
| assessment, goal | approach to work and | annually, when an |  |
| setting, application | positions. | employee is promoted, |  |

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| --- | --- | --- | --- |
| & evaluation. |  | changes positions, or |  |
|  |  | when compliance or job |  |
|  |  | requirements change. |  |
| C. |  |  |  |
| D. |  |  |  |

*3*. *Resources must be available to implement your organization’s training plan. Close integration of the identified training needs with budget and resource planning ensures that an accurate budget forecast is formulated to meet those needs. This will also improve the reliability of the data being tracked and will assist in evaluating return on investment. Certain resources may be allocated to supervisors and managers and others retained for career development or other programs. If supervisors are instructors for technical, mission-critical training, their time and the resources needed should be included. If your office has a high-level training committee, the committee members’ time needs to be included and the support they receive.*

|  |  |  |  |
| --- | --- | --- | --- |
| **3A. Training Budget** | **3B. Training Staff, Estimated Training Staff Travel Funds** | | |
| **Training Budget** | **Training** | **FTE** | **Estimated Training Staff Travel Funds** |
|  | **Staff** |  |  |
| What amount is required to | List | Indicate | Indicate the dollar amount which is required by the training |
| implement your | Federal | number of | staff to implement the training plan. Include estimates for |
| organization’s training | training | full-time | airline tickets, per diem, rental car, and privately owned |
| plan? Record this figure | staff by | equivalents | vehicle mileage. |
| here. Also include future | position | in each |  |
| resource estimates for | title | position |  |
| multi-year programs. |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

* 1. **Training Delivery, Programs, Projects, and other Significant Activities.** *Include in this section the training activities and services provided by the training function to your organization. You should also include special efforts that are beyond standard course and career development and occupational program participation. The drivers for these activities may include organizational operational requirements and DOE initiatives, such as a new personnel or contract management IT system.*

1. **Major Training Delivery Programs, Projects, and other Significant Activities**

|  |  |
| --- | --- |
| **Driver** | **Training Program/Project/Activity** |
| ***Example***: Current | ***Example***: Migrate to STRIPES no later than June 2008. |
| Administration’s e:gov |  |
| initiative |  |
| ***Example***: DOE O & | ***Example***: Workforce/Career Development Program to continue to foster |
| M 360.1B, Chap II. | employee developmental and growth opportunities through use of the following |
|  | programs: (list programs as appropriate) |
|  |  |
|  |  |

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1. *Include in this section your organization’s schedule for review and revision of individual development plans, conduct of needs assessment(s), evaluation of the training program, completion of the annual training summary report, and initiation of periodic review of the training plan.*

**5. Schedule for Review of Training Plan Requirements**

|  |  |
| --- | --- |
| **Deliverable** | **Milestone** |
| ***Example***: Review/revise/complete Individual Development Plans | 10-01-200X |
| ***Example***: Conduct Training Needs Assessment | July-Aug. 200X |
| ***Example****:*Evaluate effectiveness of fiscal year training investments | 04-15-200X |
| ***Example***: Complete Annual Training Summary Report | 04-30-200X |
| ***Example***: Prepare annual training plan budget | Sept Annually |

1. *Include in this section any mandatory training required within your organization. Mandatory training includes: (a)* ***Compliance Training****, training that is required by statute, regulation, DOE directives, and/or contract management obligations; and (b)* ***Directed Training****, training that is required by Heads of Departmental Elements (first-tier Headquarters and senior operations/field official officials).*

|  |  |
| --- | --- |
| **6. Mandatory Training** |  |
| **Training** | **Driver** |
| ***Example***: Annual Ethics Training | *5 CFR 3301* |

1. *The training plan also contains a section specific to Manager, Supervisor and Team Leader training. Your organization must indicate its plan for employees in these positions to be trained in leadership and management competencies, such as strategic planning, policy development and agency representation, Federal and DOE budget processes, managing a diverse workforce, conflict management, and human resource management and development. Also include in this section work assignments that provide experience in the use of leadership competencies.*

**7. Manager, Supervisory and Team Leader Training**

Conflict Management

DOE Budget Processes

Managing a Diverse Workforce

Environmental Laws and Regulations

1. *Lastly, each DOE element that provides DOE-wide or multi-element training must have a separate component of its training plan for that multi-element training program.*

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*Examples of this would be Security’s requirement that all DOE Headquarters Federal and contractor employees take Annual Security Refresher training annually and the Sexual Harassment training required of all DOE Headquarters Federal and contractor employees by the Office of Economic Impact and Diversity.*

8. Multi-Element Training Programs

Annual Ethics Training

DOEwide Contractor Security Basic Training

*Revising Your Plan*

*Once the basic plan has been completed, updating it every year needs to be integrated into your organization’s strategic planning and workforce planning processes. Your training plan can help your organization grow, recognize the achievement of, and retain individual employees, improve the performance of new employees, and act as a check on the practicality of your strategic plan and workforce plan. Your training plan can help you to determine if you have the competencies needed to get where you want to go with the resources you have. You may even need to revise the plan during the year to better support existing work objectives, adapt to new work objectives, or take advantage of new opportunities.*