

Reclamation Manual

Directives and Standards

Subject:	Bureau of Reclamation Human Capital Training and Development
Purpose:	Establishes Reclamation's requirements for managing and administering training and employee development programs. The benefits of this Directive and Standard (D&S) are to ensure consistent application of program requirements and principles in order to provide effective training and development of employees at all levels of the organization.
Authority:	Authority, refer to Appendix N of RCD 03-01
Approving Official:	Deputy Commissioner, Policy, Administration, and Budget
Contact:	Human Resources (HR) Division, HR Policy Office (HRPO) (84-12100)

1. Introduction.

Reclamation is responsible for developing, implementing, and evaluating training and development programs that support the achievement of its mission and goals. This D&S ensures consistent application of program requirements and principles to provide effective training and development for employees at all levels of the organization. It addresses training and development programs including: training required by law or regulation, training and/or development needed by an employee to perform existing or future duties, training needed to obtain or maintain professional credentials (also see [Reclamation Manual \(RM\) D&S, Obtaining Private Sector Temporary Help Services \(HRM 04-02\)](#)), and other programs that support Reclamation's strategic plans, performance objectives, and mission-related organizational needs.

2. Applicability.

This D&S applies to all Reclamation employees.

3. Requirements and Responsibilities.

A. Reclamation Leadership Team (RLT).

RLT members are responsible for:

- (1) implementing the training and development programs of Reclamation and the Department;
- (2) securing funding and resources to provide training and development programs;
- (3) ensuring employees complete basic skills and mandatory training and receive training required to adequately perform the essential functions of their positions;

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- (4) encouraging training and employee development participation throughout Reclamation; and
- (5) determining the need, requirements, and length for Continued Service Agreements (CSAs) in their respective organization.

B. Reclamation Human Capital Officer (HCO).

The Human Capital Officer is responsible for:

- (1) assigning managerial oversight of Training and Development programs to the appropriate HRPO Manager; and
- (2) establishing requirements to make training, education, and developmental opportunities available to employees to improve both individual and organizational capabilities.

C. Manager, Workforce Relations.

The Workforce Relations Manager is responsible for:

- (1) designating the Reclamation Learning Officer;
- (2) providing consultation services to Reclamation senior management, Human Resources Officers (HROs), and regional learning¹ officers including advice on employee development goals, issues, and trends for consideration in developing Reclamation priorities and business goals;
- (3) responding to inquiries about and proposing policy for the development of human capital that is consistent with Reclamation human capital initiatives, the Department's Human Capital Operating Plan (HCOP), and applicable legislation and regulations;
- (4) recommending, in consultation with the Reclamation and regional learning officers, appropriate uses, requirements, and timeframes for CSAs related to Reclamation employee development programs; and
- (5) providing oversight of the Learning Management System (LMS) within Reclamation to ensure it meets the needs of the bureau to make accurate data available for planning and administering training and employee development programs and reporting to the Department and the Office of Personnel Management (OPM).

¹ The terms "region(s)" and "regional" used to describe activities, functions, plans, positions, etc., in this document, refer to the five regional, and the Denver and Washington Offices learning offices.

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D. Human Resources Officers.

The HROs are responsible for:

- (1) designating the regional learning officers;
- (2) providing adequate resource support to the regional learning officers to meet the responsibilities outlined in this D&S;
- (3) providing consultation services to senior management in the region including advice on employee development goals, issues, and trends for consideration in developing office or regional priorities and goals;
- (4) responding to inquiries about and proposing guidance for the development of human capital that is consistent with regional goals, Reclamation human capital initiatives, and applicable legislation and regulations;
- (5) recommending, in consultation with their respective learning officer, appropriate uses, requirements, and timeframes for CSAs related to regional employee development programs;
- (6) maintaining a record of current CSA obligations;
- (7) checking for and determining CSA reimbursement obligations; and
- (8) informing employees and payroll of any outstanding CSA obligation.

E. Managers and Supervisors.

Managers and supervisors are responsible for:

- (1) complying with and informing employees of the provisions of associated Departmental policies, this D&S, and other Bureau or Office-level guidance and procedures on employee training and development, to include reviewing and approving employee training and development opportunities;
- (2) meeting initial and experienced supervisor requirements in accordance with paragraph 15;
- (3) ensuring permanent employees have an Individual Development Plan (IDP) created and approved within 60 days of the establishment or renewal of performance standards;
- (4) encouraging employees to attend developmental opportunities and ensuring adequate training funds are available;

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- (5) ensuring employees have time to attend training and other developmental opportunities;
- (6) providing opportunities and incentives for employees to build and/or improve competencies required for current and future work assignments;
- (7) discussing training and development needs, learning opportunities, and accomplishments with employees, ensuring that the resulting plans are documented in the employee's IDP, and keeping a current copy of the IDP for future reference;
- (8) ensuring prior year IDPs are uploaded into DOI Talent;
- (9) approving training and other learning opportunities within limits of available resources and ensuring that the approval is recorded in the LMS prior to the beginning of the activity;
- (10) ensuring employees complete mandatory training within the timeframes established by the Department, Reclamation, or the respective program office;
- (11) discussing learning objectives and competencies as they relate to employee performance and goal setting;
- (12) following up after employee training to evaluate what was learned, and determine how to apply and practice the newly acquired competencies on the job;
- (13) ensuring that external training and development is marked complete in the LMS or recommending appropriate action to the HRO if the employee did not complete the training;
- (14) sending a copy of the CSA to the respective HRO within 30 days of it being signed; and
- (15) completing training needs assessment surveys and informing the servicing HR learning officer of anticipated training needs.

F. Reclamation Learning Officer.

The Reclamation Learning Officer is responsible for:

- (1) serving as the Reclamation training officer; exercising and delegating authority to certify "Authorization, Agreement, and Certification of Training" Standard Form 182 (SF-182) to procure training and development courses and/or programs within the guidelines published by OPM and outlined in DOI-AAAP-0052 and the Reclamation Manual Delegations of Authority, Procurement of Training;

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- (2) aligning employee training and development with the mission and strategic goals of the Department and Bureau. The learning officer sets and implements Bureau level guidance and procedures for associated Departmental policies;
- (3) serving as the point of contact to DOI on the LMS for bureau specific mandatory training and other bureau wide concerns;
- (4) creating and updating a training strategic plan to ensure appropriate training and developmental programs are available to develop the human resources needed to accomplish Reclamation's mission consistent with OPM guidelines and Department policies;
- (5) working with regional learning officers to ensure that competency gaps are adequately researched, documented, and addressed;
- (6) developing and/or implementing Reclamation-wide leadership development programs that align with Reclamation's competency model and strategic plans;
- (7) coordinating Reclamation training and development activities with the regional learning officers, enabling integration of learning opportunities across Reclamation, and sharing expertise and talent when practical and applicable;
- (8) assisting regional learning officers in developing a process to evaluate training events and programs that determine how well they meet learning goals and objectives. Evaluating Reclamation-wide programs and improving Reclamation-wide training events and programs based on evaluation results;
- (9) consulting with Reclamation HR Accountability Program Manager on training and development programs to be reviewed and participate as needed in the Accountability Review process;
- (10) creating partnerships with regional learning officers and with other organizations to leverage capability and ensure currency, validity, and accuracy in human capital development initiatives;
- (11) representing Reclamation on the Interior Training Directors Council (ITDC) and coordinating human resources development matters with the Department;
- (12) leading the efforts to use technology, social media, and other state-of-the-art methods to deliver development opportunities in the most cost-effective manner; and
- (13) consulting with the Workforce Relations Manager to recommend appropriate uses, requirements, and time frames for CSAs related to employee development programs.

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G. Regional Learning Officers.

Regional learning officers are responsible for:

- (1) certifying SF-182s up to specific limits delegated by the Reclamation Learning Officer to authorize the procurement of training and development courses and/or programs within the guidelines published by OPM and outlined in DOI-AAAP-0052;
- (2) working with respective management officials to ensure all regional leadership programs and training and development opportunities are aligned with the Reclamation competency model and region, Reclamation, and Department goals;
- (3) setting direction for learning strategies that align with strategic goals and ensuring competency and skill gaps are adequately addressed;
- (4) evaluating region-specific training events and programs in accordance with Reclamation and Department requirements and improving those events and programs based on evaluation results;
- (5) providing consultation services and advice to management on learning program goals, issues, and trends to consider in developing priorities and business goals;
- (6) providing information to employees and supervisors to ensure they understand the employee development process;
- (7) ensuring that learning activities are scheduled appropriately, advertised in a timely manner, and recorded in the LMS;
- (8) providing reports and transcripts to employees and management as appropriate;
- (9) consulting with their respective HRO and the Reclamation Learning Officer to recommend appropriate uses, requirements, and time frames for CSAs related to employee development programs in the region;
- (10) providing training and guidance to employees, supervisors, and managers on the use of IDPs as a tool for performance and development improvement;
- (11) developing and implementing leadership development programs for their respective region to encourage individual growth, identify potential leaders, meet the requirements of probationary supervisors, and continuous learning by established supervisors and managers; and
- (12) assisting the Reclamation learning officer with design, development, implementation, and evaluation of bureau wide training and development initiatives.

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H. Employees.

Employees are responsible for:

- (1) planning and being fully engaged in their own career development;
- (2) identifying, discussing with their supervisor, and documenting current development needs, career plans, and objectives on an IDP;
- (3) discussing career development goals with supervisor to ensure training needs are met;
- (4) seeking training and developmental assignments to meet developmental needs;
- (5) notifying their supervisor if they are not able to complete an assigned training activity or program;
- (6) learning how to use the LMS to request training;
- (7) requesting training through the LMS;
- (8) ensuring written or electronic supervisory approval is received before attending developmental activities;
- (9) sharing knowledge and skills gained from training and development activities with co-workers to increase competency levels in the organization; and
- (10) requesting an accommodation (for example a sign language interpreter), if needed, from the sponsoring program office.

I. Sponsoring Program Office.

Offices that require, sponsor, or oversee mandatory training programs are responsible for:

- (1) requesting assistance from the bureau and regional DOI Talent staff in a timely manner and providing adequate resources to support the effective implementation of program office training requirements in accordance with governing regulations; and
- (2) tracking and reporting completions and ensuring respective training requirements are met.

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4. General Provisions for the Selection and Approval of Training Requests.

- A. The selection and assignment of employees for training is based on requirements identified in laws and regulations, Reclamation's current and continuing operational needs, and the immediate training needs and career potential of the employee. Supervisors and managers must consider the following factors when authorizing and approving training:
- (1) degree of employee's need for development in the present position;
 - (2) extent to which the employee's competency, knowledge, skills, abilities, and/or performance are likely to be improved;
 - (3) degree to which the organization expects to benefit from the employee's improved competency, knowledge, skills, abilities, and/or performance;
 - (4) ability of the employee to pass the training benefits on to others;
 - (5) employee's interest and efforts to improve performance;
 - (6) potential of the employee for advancement; and
 - (7) financial and other resources of the approving office.
- B. Merit principles and procedures (fair and open competition) must be followed when selecting a career or career-conditional employee for training which is part of an approved training agreement (for example Reclamation's Rotation Engineer Program), part of a promotion program, or given primarily to prepare an employee for advancement. This provision does not apply if merit promotion procedures have already been applied (for example training required by the Pathways Programs).
- C. Selection of employees for training must be made without regard to political preference, race, religion, color, national origin, gender, marital status, age, sexual orientation, disability (physical or mental), and with proper regard for their privacy and constitutional rights as provided by the merit system principles set forth in 5 U.S.C. 2301(b)(2). Training facilities and curriculum must be accessible to employees with disabilities and necessary accommodations including, but not limited to, sign language interpreters or readers, will be provided when requested.

5. Training That Must be Recorded in the LMS and/or Requires Supervisory Approval.

- A. Training Requiring Approval and Recording.

Learning activities such as training, workshops, or other forms of educational activities where the goal is to improve an individual's knowledge, skills, abilities, and competencies must be approved and/or recorded in the LMS. This includes all Federal,

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Department, or Reclamation required training, regardless of length, and any federally paid for learning activity over one hour in length.

B. Exceptions to Approval and Recording Requirements.

Training that does not require supervisory approval and is not recorded in the LMS includes:

- (1) training that occurs spontaneously or casually/incidentally (e.g., reading a book, having a discussion, web casts, briefings, informal on-the-job training, etc.);
- (2) training where there is no way to evaluate if the training improved knowledge, skills, abilities, or competencies (e.g., exercises where the emphasis is on exercising a plan or process and/or no individual learning objectives are identified in the planning documentation);
- (3) training that is one hour or less in length, unless the training is mandatory or required; or
- (4) training that is neither job related nor paid for by the Federal Government.²

C. Supervisor Notification.

Employees must ensure that the first-line supervisor is aware of and approves official time being spent in any learning activity whether or not supervisory approval is required in the LMS.

6. Requests for and Approval of Training.

- A. Training must be requested and approved in advance of the training activity start date. Any training that did not receive prior approval will be considered an unauthorized commitment and must be reviewed and ratified by the local servicing acquisitions office in accordance with Federal Acquisition Regulation 1.602-3. The employee may be financially liable for payment if prior approval is not documented.
- B. All internal training must be requested and approved through the LMS. The exception is that some mandatory training will be automatically assigned in the LMS and will therefore not require supervisor approval.

² Employees or supervisors may request that this training be recorded in the LMS. An example using contact hours to compute the service commitment for a 120-credit academic degree assuming two, three-credit courses per semester, a 12-week semester, and 20 semesters to complete the degree: three credits X two courses (six credits/semester) X 12 weeks (one semester) = 72 contact hours per semester X 20 semesters = 1440 contact hours for the program. 1440 Contact hours / 40 work hours/week = 36-week training period X three = 108 weeks minimum service commitment for this program.

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- C. External training, including college courses, is requested, and approved using the Authorization, Agreement and Certification of Training (SF 182) within the LMS.
- D. The SF-182 is also used to procure training for a group of employees attending the same course following the guidelines published by OPM and AAAP-0052. For example, the SF-182 can be used to procure an instructor to teach a course at a Reclamation facility where several employees will be trained.

7. Conference Attendance as Training.

An employee may attend a conference as a training activity when:

- A. The announced purpose of the conference is educational or instructional;
- B. More than half of the time is scheduled for a planned, organized exchange of information between presenters and audience which meets the definition of training under 5 U.S.C. Sec. 4101; and
- C. The content of the conference is germane to improving individual and organizational performance, and development benefits will be derived through the employee's attendance. Refer to ADM 04-01, [Planning, Approval, and Reporting Conference Related Activities for Spending](#), for additional information on conference requirements.

8. Mandatory Training.

Mandatory training must be completed within the required timeframes set forth by the Department, Reclamation, and/or the sponsoring program office responsible for the mandatory training. The sponsoring program office is responsible for tracking, reporting completions, and ensuring that these training requirements are met. The learning office provides assistance and training on obtaining necessary reports and/or information from the LMS.

9. Failure to Complete Training.

An employee who fails to complete approved training that is not subject to a CSA shall notify his/her supervisor of the circumstances and reason(s). If the employee is at fault, the supervisor must make a recommendation to the respective HRO regarding any action to be taken, which may include recovery of all or part of the expenses of the training.

10. Continued Service Agreement.

When a CSA is used, the minimum service obligation is three times the length of the training period, and it must be signed by the employee and their first-line supervisor before the training begins. An employee cannot be asked to sign a CSA after the training has begun. Obligated service begins on the employee's first workday after training is completed.

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- A. RLT members establish requirements that must be included in their respective organization's business practices regarding when a CSA is required and the length of the service obligation for the following situations:
- (1) RLT members will determine if CSAs are required and the appropriate length of service obligation for academic courses funded by their respective organizations based on cost, amount of official time used, or other justification. RLT members sponsoring and/or overseeing Reclamation leadership development programs will determine if CSAs are required and the appropriate length of service obligation for those programs. The CSA requirement must be included in each announcement.
 - (2) Regional directors will determine if CSAs are required and the appropriate length of service obligation for their respective regional leadership development programs. The CSA requirement must be included in the respective program announcements.
- B. The service requirement for employees selected for an academic degree program will be based on the academic institution's contact hours with employees required to serve a minimum of three times the number of contact hours. Obligated service will begin upon the completion of the entire degree requirements. An employee leaving the Department without completing the obligated service must repay Reclamation for the total cost of the degree.
- C. If an employee is involuntarily separated from the Federal Government, the employee is no longer required to reimburse the agency. The agency cannot require reimbursement under these circumstances.
- D. RLT members may determine when it is appropriate to release an employee from a CSA obligation before it expires if it is shown that recovery would be against equity and good conscience, against the public interest, or repayment would cause the employee to experience a substantial demonstrable financial hardship. If an employee voluntarily separates from the Department under a CSA with an original obligation of:
- (1) six months or less, the employee will be required to reimburse Reclamation for the full cost of the course(s) to include tuition, books, materials, and other fees (e.g., lab fee);
 - (2) more than six months, the employee will be required to reimburse Reclamation on a prorated basis for the cost of the training or the amount dedicated to each participant's development in a leadership program (e.g., if the amount expended for training/development computes to \$24,000 per participant and the required service is two years, the reimbursable amount will be \$1,000 for each month of obligated service not completed).

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- E. Tracking and enforcement requirements of CSA obligations include:
- (1) supervisor sending a copy of the CSA to the respective HRO within 30 days of it being signed;
 - (2) HRO maintaining a record of current CSA obligations;
 - (3) HRO checking for current CSA obligations during employee checkout procedures and determine any reimbursement obligation; and
 - (4) HRO informing the employee and the respective payroll office of any outstanding obligation.

11. Individual Development Plan.

- A. All permanent employees are required to develop an IDP in consultation with their supervisor to help define and set training and developmental goals. The IDP may include any type of training or development activity that is applicable or relevant to the employee's current position duties or career development and must contain all required or mandatory training identified for the employee.
- B. To be effective, IDPs are updated annually, at a minimum, in conjunction with the employee's performance appraisal reviews. More frequent updates are suggested and may be required in some instances (e.g., probationary supervisors and employees hired under special hiring authorities).
- C. As employees make critical career transitions (e.g., from a non-supervisory to a supervisory position or from a supervisor to a manager), additional training will be identified on the employee's IDP.
- D. All permanent employees must upload the previous year IDP in the LMS, if applicable.

12. Training Needs Assessment.

A training needs assessment is essential to planning and implementing a strategic workforce development program. The Reclamation Learning Officer will administer a bureau level training needs assessment no less than once every two years on a calendar year basis. The results of the assessment will be used to determine training and development needs, training needs trends, forecast budgets, and develop training plans. Assessments are also used to identify competency gaps in the workforce and aide in the development of workforce succession plans. As part of the training needs assessment, a review of Reclamation employee development programs is required to ensure they are effectively meeting identified organizational needs at the best value to the government.

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13. Procurement and Payment for Training.

Reclamation may pay for all or part of the necessary expenses of training including travel, lodging and per diem, tuition, matriculation fees, professional certifications, licenses, library and laboratory services, purchase or rental of books and/or training materials, other services or facilities directly related to the training of the employee, temporary duty training assignments, conference registration fees, and course or workshop registration fees in accordance with 5 U.S.C. 4110 and D&S, Approval and Reporting for Conferences Hosted, Attended, or Co-Sponsored by Bureau of Reclamation Employees (ADM 04-01).

- A. Government Purchase card holders are authorized to pay for training services limited to the micro-purchase threshold of \$10,000 that have been approved prior to the start of the training by the supervisor in the LMS or on an SF-182, also within the LMS using the external training process. For training costing more than \$10,000, the request must be submitted to the servicing HR learning officer for approval and payment.
- B. The Reclamation and regional learning officers are authorized by DOI-AAAP-0052 to procure training, enroll students, obligate funds, and authorize payment for tuition by certifying an SF-182 under the following conditions:
 - (1) the SF-182 is approved prior to the start of any training or developmental activity by the supervisor and the management official having budgetary responsibility for the funds;
 - (2) the training cost of a single training event, program, or instructional service does not exceed the lesser of the limit delegated to the learning officer or the simplified acquisition ceiling established in the Federal Acquisition Regulations and referenced in DOI-AAAP-0052;
 - (3) the cost is of a fixed nature (e.g., price per student or price per course, program, or instructional service); and
 - (4) the program, course, or instructional service is off-the-shelf, and no modification or development resulting in increased cost to the Government is needed to meet the organization's needs.
- C. This authority does not allow for the purchase of general supplies, training equipment, and non-training services.
- D. Current fiscal year funds may be used to pay for training occurring in the next fiscal year as long as the training meets the following requirements:
 - (1) the training provider requires the agency to register during the expiring fiscal year;

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- (2) the date offered is the only one available; and
- (3) the time between registration and training is not excessive, usually within the first quarter of the following fiscal year.

14. Inter–and Intra-Agency Training.

Reclamation is authorized to furnish and/or participate in inter- and intra-agency training on either a reimbursable or non-reimbursable basis whenever this will result in better training, improved service, or savings to the Government. Fees received from participants from other Federal agencies may be credited to Reclamation’s appropriation used to pay for the training.

15. Supervisory and Managerial Development.

- A. Within one year of a new supervisor’s appointment, they must complete initial supervisory training consisting of the “Reclamation Strategies for Successful Supervision (RS3)” course supplemented by training that meets the needs of Reclamation and of the new supervisor.
- B. All supervisors must receive additional training at least once every three years on the use of appropriate actions, options, and strategies to: mentor employees; improve employee performance and productivity; conduct employee performance appraisals in accordance with departmental appraisal systems; and identify and assist employees with unacceptable performance in accordance with OPM Federal Supervisory and Managerial Framework.

16. Leadership and Employee Development.

- A. Reclamation employees are encouraged to continuously develop their soft and leadership skills throughout their career. The Reclamation HR Development community provides the following developmental opportunities:
 - (1) Reclamation Leadership Development Program (RLDP). A bureau wide leadership development program with a target audience of GS-13 and 14, or equivalent pay grades. Program content is aligned with the Reclamation Leadership Development Competency Model and focuses on developing participants in the Executive Core Qualifications (ECQ), and associated competencies to a proficiency level four. RLDP is the highest-level leadership development program hosted by Reclamation. (Advanced level program).
 - (2) Reclamation Intermediate Leadership Development Program. A bureau wide development program with a target audience of GS-12 to GS-14, or equivalent pay grades. Program content is aligned with the Reclamation Leadership

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Development Competency Model and focuses on developing participants to a minimum proficiency level of three. (Intermediate level program).

- (3) Reclamation Aspiring Leaders Program. Regional and Denver/Washington Office development programs with a target audience of GS-7 to GS-11, or equivalent pay grades. Program content is aligned with the Reclamation Leadership Development Competency Model and focuses on developing participants to a minimum proficiency level of two. (Introductory level program).
- (4) Regional and Denver Development Activities. Additional leadership and professional development opportunities exist at the regional and Denver servicing HR offices. Servicing HR offices are responsible for the delivery and administrative requirements of these courses and programs. (Fundamental level courses and programs).

- B. Supervisors, managers, executives, and other leaders will work with employees to develop the talents, skills, and competencies needed to professionally develop employees at all levels in the organization.
- C. Current and future leadership development programs throughout Reclamation must be based on Reclamation's Leadership Competency model. Leadership development programs must also be designed to meet and support specific business requirements including but not limited to:
 - (1) assisting potential and existing leaders to explore the challenges of leadership and understand business processes specific to Reclamation;
 - (2) determining employee commitment and ability to be an effective leader;
 - (3) filling competency gaps for senior staff that have little or no supervisory experience;
 - (4) providing continuing education and development for managers, supervisors, and senior executives; and
 - (5) sharing best practices and identifying leadership competency gaps within Reclamation.

17. Training and Curriculum Development Requirements.

- A. Formal professional development curriculum created by Reclamation Human Resources will be developed with an instructional design methodology. Although a specific methodology or model is not directed, formal training programs and curriculum must include the following phases, Analysis, Design, Develop, Implement, and Evaluate (ADDIE). These requirements apply to recurring formal training events.

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- B. **Training Lesson.** A training lesson is an educational session generally focused on a single topic or multiple similar topics. Lessons will have a lesson plan or instructor guide, learning objectives, lesson content (PowerPoint slides, computer-based training, etc.), and participant handout materials or participant guides where appropriate.
- C. **Training Course.** A training course is an educational event consisting of multiple lessons designed to cover numerous topics or events and is usually delivered over several days or weeks. Courses with more than eight lessons require a syllabus.
- D. **Training Program.** A training program is an educational event consisting of multiple courses with the goal of developing participants in several competencies and delivered over an extended period, usually weeks or months.
- E. **Learning Objective.** Learning objectives are one of the most important items in a lesson. They tell the participants the knowledge they will gain or the skill they will be able to perform when the training is accomplished. Learning objectives should be developed according to a hierarchical learning approach with associated proficiency levels such to Blooms Taxonomy.
- F. **Lesson Plan.** A detailed description to guide in the facilitation of a lesson to achieve the intended learning outcome. Lesson plans include lesson outlines, learning objectives, and specific information and instructions necessary for effective lesson delivery.
- G. **Participant Materials.** Guides, handouts, and other instructional materials provided to participants to aid in the delivery of lesson content.
- H. **Syllabus.** A document containing all course lessons, prerequisites, schedules, checklists, lesson and course equipment, instructional delivery methods, enrollment information, attendance requirements, and all other administrative items.

18. Training and Development Evaluation.

Reclamation is required to evaluate its training and development activities on a regular basis to measure training effectiveness and ensure alignment with strategic goals.

- A. The metrics of the evaluation are dependent on the level of evaluation but generally include measuring the results of training and development programs in terms of learning, performance, work environment, and contribution to accomplishing Reclamation's mission.
- B. The number of evaluation levels conducted for a particular training event must be determined by carefully considering, at a minimum, the criteria in Paragraph 18.C. The four levels are:

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- (1) Level One. Reaction—The degree to which participants find the training favorable, engaging, and relevant to their jobs;
 - (2) Level Two. Learning—The degree to which participants acquire the intended knowledge, skills, attitude, confidence, and commitment based on their participation in the training;
 - (3) Level Three. Behavior—The degree to which participants apply what they learned during training when they are back on the job; and
 - (4) Level Four. Results—The degree to which targeted outcomes occur as a result of the training. Did the training make a difference? Did the result meet the intended goal?
- C. Due to the complexity and potential challenges associated with conducting level four evaluations, level four will be considered on a case-by-case basis. Higher evaluations also require the lower-level evaluations. For example, a level three evaluation also requires levels one and two. Training events in DOI Talent will use the standard evaluation criteria in the LMS. For training events conducted by Reclamation human resources employees the following requirements exist:
- (1) conduct level one for formal training lessons;
 - (2) conduct level two for formal training courses;
 - (3) conduct level three for formal training programs;
 - (4) conduct level four as directed by RLT.

19. Training Requiring Foreign Travel.

Department approval is required for individuals attending training that requires foreign travel. Offices must notify the Native American and International Affairs Office (NAIAO) in advance of all plans to travel to any other country. NAIAO will then work with travelers to obtain all internal and Department of the Interior approvals, official passports, visas, and country clearances from the Department of State required for international travel.

Notifications of upcoming travel can be sent to the Program Manager, Native American and International Affairs, Mail Stop 86-43000.

20. Academic Degree Training.

Based on Section 1331 of the Homeland Security Act of 2002, the Department has authority to select and assign an employee to academic degree training when this training is part of a planned, systemic, and coordinated agency employee development program. In general, training designed to result in academic degrees can be authorized only in very limited

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circumstances. Funding for individual academic courses, which may contribute to an academic degree, may be approved based on the course's relevance to the employee's existing and/or future duties. Senior Executives may request an academic degree program with a memo through the HRPO Workforce Relations Manager and the Human Capital Officer to the Department.

A. The request must certify that:

- (1) funds are available to conduct the proposed program;
- (2) the program is accredited by a nationally recognized body; and
- (3) the training is not for the sole purpose of providing an employee an opportunity to obtain an academic degree or qualify for appointment to a particular position for which an academic degree is a basic requirement.

B. The request must also include a description of how:

- (1) the program contributes significantly to meeting an identified training need, resolving a staffing problem, or accomplishing a goal in the agency's strategic plan; and
- (2) the program is consistent with merit system principles, maintaining a balanced workforce, and providing employees effective education and training to improve organizational and individual performance.

21. Acceptance of Contributions, Awards, and Payments from Non-Government Organizations.

Employees may only accept contributions, awards, and payments (including training) from non-Government organizations under certain circumstances governed by 5 CFR 2635 (Standards of Ethical Conduct for Employees of the Executive Branch) and 41 CFR 304 (Payment of Travel Expenses from a Non-Federal Source). Employees must contact Reclamation's Deputy Ethics Counselor or an Assistant Ethics Counselor for clarification on when it is appropriate to accept contributions, awards, or payments from a non-Federal source.

22. Paying Premium Pay.

Except as provided in 5 CFR 410.402(b) (1998), no funds appropriated or otherwise available to an agency may be used for the payment of premium pay to an employee engaged in training. As a general rule, employees cannot receive overtime pay or compensatory time off for time spent in training.

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23. Training Treated as Hours of Work Under the Fair Labor Standards Act (FLSA).

Non-exempt FLSA employees can receive overtime pay in specific limited circumstances, see 5 CFR 410.402(d)(1).

24. Overtime Payment for Travel Related to Training.

For employees exempt from FLSA, the general rule is that time spent traveling from the official duty station to a temporary training site is not hours of work unless the travel results from an event that could not be scheduled or controlled administratively by an executive agency of the Federal Government, e.g., OPM, Department, or Reclamation. For non-exempt FLSA employees, see 5 CFR 551.422 for specifics about when time spent traveling is considered hours of work.

25. Training Records Retention and Reporting.

Reclamation must maintain training records consistent with the requirements of the Privacy Act and other records management policies to ensure that the data reported to OPM as outlined in the Guide for Collection and Management of Training Information, and the Guide to Human Resources Reporting is accurate and complete. This requirement is generally fulfilled by using the LMS to record and approve all training related events and transactions. Records will be retained in accordance with Department record retention schedules (see Information Management Handbook, Volume II, Records Retention Schedules).

26. Paying for Food, Drink, Refreshments, Snacks or Entertainment as Part of a Training Event.

Payment for these items is rarely allowed or authorized. Refer to Acquisition Circular (RAC) 20-02, Conference Related Expenses and Purchases of Entertainment for more details on this topic.

27. Definitions.

A. Academic Degree Training.

A program that allows selected employees to participate in training leading to an academic degree. It must meet an identified training need, resolve a staffing problem, or accomplish goals in the agency's strategic plan, and be approved by the Department. The degree program must be accredited by a nationally recognized body.

B. Analysis, Design, Develop, Implement, and Evaluate (ADDIE).

An instructional systems design methodology used to create training programs and curriculum through thorough analysis, design, development, implementation, and

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evaluation of training program requirements, contents, data, and other pertinent information.

C. Approved Training Agreement.

A document authorizing a comprehensive training program meeting the requirements of the Department's Personnel Bulletin No. 12-8 and approved by OPM that allows exception to time-in-grade requirements established in 5 CFR 300.604. (It allows an individual to be promoted more than once, but not more than two times, in a 52-week period).

D. Coaching.

Partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.

E. Competency.

An observable, measurable pattern of skills, knowledge, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully and encompass attributes that differentiate performers.

F. Conference.

A meeting, workshop, retreat, seminar, symposium, or other event that involves attendee travel and the travel conference attendance purpose code definition applies.

G. Contact Hour.

A unit of measure that represents an hour of training received through direct instruction.

H. Continued Service Agreement (CSA).

An agreement that an employee makes with Reclamation to continue to work for the agency for a pre-established length of time in exchange for the Government funding costly or time-consuming training or educational opportunities. If the employee voluntarily leaves the agency before completing the service obligation, they must repay the Government some or all of the costs, excluding salary, associated with the training (5 U.S.C. 410.309). The service obligation begins when the training is complete.

I. Course.

An educational event consisting of multiple lessons.

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J. **Evaluation.**

The process of evaluating the effectiveness and suitability of training and development activities to close identified competency gaps. The depth of evaluation varies depending on the scope and impact of the training. Training evaluation methods can include observation, pulse checks, tests, pre- and post-activity assessments, interviews, demonstrations, simulations, supervisor evaluation, post-activity follow-up surveys, and other appropriate methods.

K. **Experiential Learning.**

Process of learning through experience, more specifically defined as "learning through reflection on doing". Hands-on learning can be a form of experiential learning but does not necessarily involve students reflecting on their product. Experiential learning is distinct from rote or didactic learning, in which the learner plays a comparatively passive role. It is related to, but not synonymous with, other forms of active learning such as action learning, adventure learning, free-choice learning, cooperative learning, service-learning, and situated learning.

L. **External Training.**

Training that is not listed in the Learning Management System course catalog.

M. **Formal Training.**

A learning experience that is designed, developed, implemented, and evaluated in accordance with accepted talent development practices. Formal training is structured, goal-oriented, and executed by trained professionals. Training can take the form of classroom or virtual instruction, field workshops, professional seminars, or other activities.

N. **Individual Development Plan (IDP).**

A tool to help an employee, working with their supervisor, identify and fill gaps in essential job competencies and to help employees reach career goals within the context of organizational needs and objectives. An IDP will also help supervisors plan for effective use of training and development resources. An IDP is neither a contract or guarantee that training or advancements will occur nor is it an element of a performance appraisal or rating scheme.

O. **Informal Training.**

Any learning experience that benefits an audience but does not otherwise meet the definition of formal training.

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P. Instructional Design.

The practice of creating experiences to support learning. A systems approach to analyzing, designing, developing, implementing, and evaluating an instructional experience.

Q. Internal Training.

Training that is listed in the LMS course catalog.

R. Learning Objective.

A description of what the learner must be able to do upon completion of an educational activity.

S. Lesson.

An educational event generally focused on a singular topic consisting of one or more learning objectives.

T. Learning Management System (LMS).

The Department's automated system that contains the training catalog, and is used to register, approve, record, and report employees' training.

U. Mandatory Training.

Training that is mandated by statute or regulation, required by Department or Reclamation policy, or identified as critical to the development of employees to the mission of the Department, Reclamation, or a region by the head of that organization.

V. Mentoring.

A process that focuses specifically on providing guidance, direction, and career advice. Mentoring is usually a formal or informal relationship between two people--a senior mentor (usually outside the protégé's chain of supervision) and a junior protégé.

W. Proficiency Level.

Proficiency levels indicate the expertise or mastery an individual must demonstrate in a competency. Proficiency levels range from one to five (awareness to expert) and increase in difficulty and autonomy at each higher level.

X. Program.

An educational event consisting of multiple courses delivered over a period of time.

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Y. **Reclamation Leadership Team (RLT).**

The RLT consist of senior leadership positions as identified by the Reclamation Chief of Staff and Commissioner.

Z. **Training and Development.**

The process of providing for and making available to an employee, and placing or enrolling the employee in, a planned, prepared, and coordinated program, course, curriculum, subject, system, or routine of instruction or education, in scientific, professional, technical, mechanical, trade, clerical, fiscal, administrative, or other fields which will improve individual and organizational performance and assist in achieving the Department's mission and performance goals.

28. Review Period. The originating office will review this release every four years.