PEACE CORPS

Programming, Training, and Evaluation Guidance

Peace Corps
Publication No. T0140

Acknowledgements

The Peace Corps 2015 *Programming, Training, and Evaluation Guidance* (No. T0140) aims to provide agency staff with consistent and clear guidance for designing, implementing, managing, training for, and evaluating Peace Corps projects. This is an updated revision of the 2011 *Programming and Training Guidance*, written by Doreen Salazaar in the Office of Overseas Programming and Training Support (OPATS). This updated, four-part document is intended to be interim guidance that reflects the changes brought about by the 2011 agency assessment. This assessment resulted in an agency-wide effort to "focus in and train up" Peace Corps projects. The 2015 version also serves to help transition the agency's PT&E Guidance to an electronic format that is more streamlined, more easily reviewed, and that can be updated as needed in the future.

The *Programming, Training, and Evaluation Guidance* revisions were led by Katie Green, a consultant in the Office of Overseas Programming and Training Support. Many other staff members contributed greatly to the guidance, including Evaluation Specialist Kim Norris; Technical Training Specialists Joayne Larson, Mary Lu Schweitzer, and Kristine Hoffer; Language Training Specialist Ruth Goode; Professional Development Specialist JJ DiBella; Programming and Training Specialists (Gender) Meghan Donahue and Kathryn Goldman; Professional Development Specialist (Administration) Joyce Gordon-Shapkaliska; and Chief of Programming and Evaluation Joanie Cohen-Mitchell. In addition, Chief of Overseas Professional Development Rick Record, and Chief of the Training Unit Lisa Cohen, also contributed to this effort. Finally, the Chiefs of Programming and Training for each region—Amy Johnson for the IAP region, Krista Rigalo for the Africa region, and Betsy Vegso for the EMA region—provided important review and input. Other offices contributed to specific components of the guidance, including Volunteer Recruitment and Selection and the Office of Global Partnerships.

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A. About the Programming, Training, and Evaluation Guidance

The Peace Corps *Programming, Training, and Evaluation Guidance* (PT&E Guidance) will assist field PT&E staff to optimally support trainees and Volunteers to build the capacity and contribute to improving the lives of people in their country of service.

The PT&E Guidance consists of four parts:

Part 1 of this guide provides an overview of the Peace Corps' mission, goals, and approach to development. (Intended for all staff.)

Part 2 of this guide explains the way in which the Peace Corps works to achieve its mission by helping host countries provide a public benefit and improve well-being among their community members through implementing Peace Corps projects. Part 2 outlines how to develop a project plan, including a project framework, as well as the development of a monitoring, evaluation, and reporting plan. (Intended primarily for programming staff.)

Part 3 of this guide explains the Peace Corps' approach to training design and will help post staff assess, design, and adapt an effective training program to prepare and empower Volunteers throughout their service. (Intended for all staff involved in training.)

Part 4 covers topics related to management and implementation of Peace Corps PT&E. This section covers planning, budgeting, and funding, as well as building effective teams and Volunteer support. (Intended for all PT&E staff.)

All four parts of this guide are intended to provide simple and easy-to-use reference materials for post staff as they build quality programs. It is unlikely that staff will read these guides thoroughly; however, the material should be easily searchable by topic. The Peace Corps recognizes that many of the components of programming, training, and evaluation are continuously evolving and improving. To make this a more nimble reference guide, links or references are provided to topics that have more definitive and thorough resources. Please send comments or feedback on the content of this guide to the OPATS Knowledge and Learning Unit at KLU@peacecorps.gov.

Readers may also find the following additional sources of PT&E policy and reference documents useful:

- **The *Peace Corps Manual***: Authoritative policies and procedures governing the operations of the Peace Corps in the United States and overseas. Hyperlinks to the relevant sections of the *Peace Corps Manual* are linked throughout the guidance.
- **Peace Corps programming, training & evaluation resources**: A compendium of Peace Corps resources aimed to help post staff maximize what Volunteers do best through providing guidance, training materials, evaluation tools, and other relevant PT&E documents on the intranet.
- **Peace Corps publications**: A collection of Peace Corps-produced publications that are disseminated to posts. These are primarily designed to assist Volunteers in their work, but many publications cover broad areas of teaching, learning, and facilitating. In 2015, staff, Volunteers, and guests will have access to PCLive, the agency's global platform for knowledge and information exchange.
- **The Peace Corps intranet**: Includes information from each office, Peace Corps-produced resources, and the *Peace Corps Manual*.

Select Resources

- PT&E Glossary
- PT&E Abbreviations and Acronyms

B. The Peace Corps' Approach to Development

B.1 The Peace Corps' Three Goals

The Peace Corps is an independent U.S. government agency that provides opportunities for Volunteers to serve in countries around the world that request assistance. The agency traces its roots and mission to 1960, when then-Senator John F. Kennedy challenged students at the University of Michigan to serve their country in the cause of peace and friendship by living and working in developing countries.

While times have changed, the agency's mission—to promote world peace and friendship—has not. The three core goals of the Peace Corps are as relevant today as they were more than 50 years ago. These three core goals are embodied in the Peace Corps Act (Public Law 87-293, the full amended text of which can be found in the *Peace Corps Manual,* Section 101):

1. To help the people of interested countries in meeting their need for trained men and women.
2. To help promote a better understanding of Americans on the part of the peoples served.
3. To help promote a better understanding of other peoples on the part of Americans.

The focus of the PT&E Guidance is the Peace Corps' First Goal: supporting work led by host country leaders to meet the needs of low-income communities through trained Volunteers, with an emphasis on building capacity rather than financial support. Although the wording of the goal may lead some to believe that Volunteers are highly trained technicians, the Peace Corps is not designed to fill voids in host country expertise. Rather, Volunteers and their host country partners are motivators and trainers, working to facilitate and build local capacity to manage development during and after their service.

While the Peace Corps' First Goal is the focus of the PT&E Guidance, it is important to note that this goal is best achieved through the integration of the Second and Third Goals. For Volunteers to effectively meet host country needs for technically trained individuals, they must also understand the host country's culture and share their own culture with host country nationals. Volunteers and members of their communities learn from each other, share their learning with others, and, as a result, promote greater opportunities for development and peace around the world.

B.2 The Peace Corps Strategic Plan

The three goals of the Peace Corps are also the foundation for its Strategic Plan, which reflects the core values and vision that shape and guide decisions at all levels in the agency. Currently, the Peace Corps is operating under the 2014–2018 Strategic Plan and the FY 2014–2015 Annual Performance Plan, which provide the goals, objectives, strategies, and activities that will be used to achieve the agency's long-term vision. The current strategic goals are as follows:

- Strategic Goal 1: Building Local Capacity
- Strategic Goal 2: Sharing America with the World
- Strategic Goal 3: Bringing the World Back Home

Select Resources

- Kennedy's Promise
- MS 101: The Peace Corps Act
- The Peace Corps Fact Sheet
- PC Press Kit
- *The Peace Corps Strategic Plan*
- Peace Corps Logic Model
- Peace Corps Third Goal Resources

B.3 The Peace Corps' Unique Role in Development

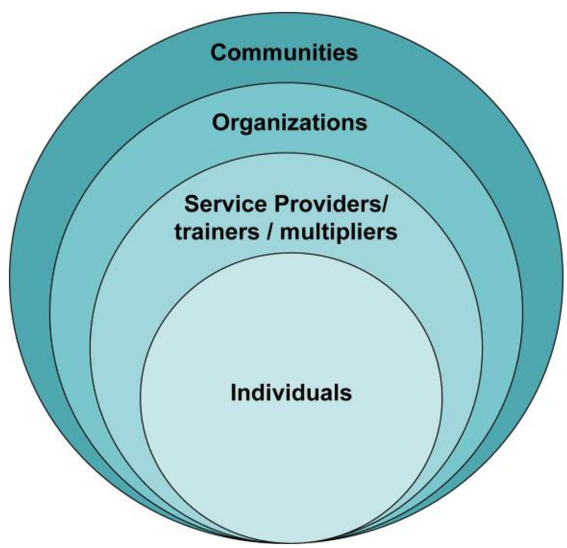
The Peace Corps is a Volunteer-based development agency that differs from bilateral donors, nongovernmental organizations (NGOs), and other development organizations in the following ways:

- **Independent.** The Peace Corps is not involved with the day-to-day conduct of U.S. foreign policy, is not involved with intelligence activities, and has programs that do not depend on outside funding that may be politically driven. Refer to the Peace Corps–State Department relations cable.
- **People-to-people and community-based.** The majority of Volunteers live and work with the low-income rural or urban communities that the Peace Corps serves. Staff and Volunteers work directly with individuals and communities to design, reflect on, and revise programs and activities to meet the needs of the communities they serve.
- **Capacity building.** The Peace Corps works at the grassroots level to build the capacity of host country people and organizations to shape their own development and to sustain development changes beyond the service of the Volunteers. The Peace Corps does not fund infrastructure projects with appropriated funds.

B.4 Capacity-Building Framework

Development in its broadest sense is any process that promotes the dignity of a people and their capacity to improve their own lives.

In this sense, development work means the ***development of the capacity of people***. Peace Corps Volunteers help people learn to identify and prioritize what they would like to change, to use their own strengths, and to learn new skills to achieve that change. With this approach, development is not just about creating a garden, but organizing and working with people to establish and maintain their own gardens.

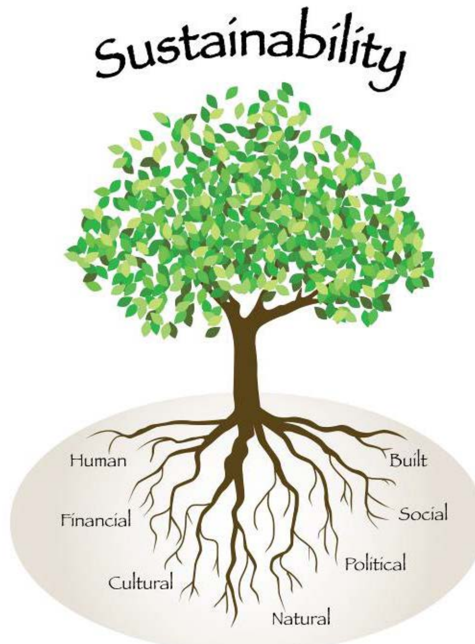


To maximize the effectiveness of their service and the long-term sustainability of their work, Volunteers use the Peace Corps capacity-building framework, which gears their efforts toward several different, but integrated levels:

- **Individual members of the community**: The main focus of the Peace Corps—whether directly through the efforts of Volunteers or through those trained by Volunteers—is to build capacities at the individual level and empower community members to improve their quality of life. For example, Volunteers often work with individual students, youth, women, farmers, NGO clients, and others.

- **Service providers, trainers, and multipliers**: Strengthening the capacities of service providers, trainers, and other multipliers—whether they are teachers, leaders of an NGO, young peer educators, or managers of a farmers' cooperative—helps ensure local leadership for continuing activities into the future.
- **Organizations**: Strengthening organizational and institutional capacities, such as management skills within an NGO, helps support other activities in an ongoing, functioning, and supportive environment.
- **Communities**: The work of Volunteers and host country partners also builds capacity at the community level, facilitating the development of communities' human, social, cultural, natural, built, political, and financial assets.

B.5 Sustainability



Volunteers promote sustainability (human, financial, cultural, natural, political, social, and built) by facilitating systems improvements and organizational change. For example, Volunteers may work with regional or national organizations to improve teacher-training curricula.

Volunteers use gender-sensitive participatory approaches to analyze, design, implement, and evaluate projects to ensure that they have considered different contextual factors, and to support the sustainability of the changes they promote.

All Peace Corps projects consider how the sustainability of Volunteer efforts can be ensured, often by working with partner organizations to strengthen systems. For example, Volunteers may help a women's cooperative improve its record-keeping procedures. Such organizational changes not only improve sustainability, but they also often improve the amount or quality of service provided and the volume of business conducted.

B.6 Promoting Behavior Change

Peace Corps Volunteers and staff understand that the effectiveness of their contributions depends on the *application* of new knowledge, skills, and attitudes by individuals and service providers—a process which often demands significant behavior change. Recognizing the advances made by the public health sector in developing behavior change principles and tools, the Peace Corps strives to incorporate these improvements in all relevant Volunteer work areas. We help Volunteers and their partners understand and develop strategies which recognize that:

- Barriers to behavior change are extremely complex, and the reasons people adopt new behavior patterns are not always intuitive to the outsider. Therefore, decisions regarding activities designed to bring about behavior change should be based upon *rigorous research*, not intuition.
- Behaviors that are steps toward a final goal often need to be reinforced.

- New patterns of behavior often replace or compete with former patterns of behavior that are satisfying, habitual, or cued by the environment.
- Ongoing reflection and accountability toward goals can improve goal achievement.

B.7 Performance and Accountability Report

Each year, the Peace Corps prepares a *Performance and Accountability Report* so that the President, Congress, and the American people can assess the agency's operations for the year. The agency reports against the performance goals and indicators in the *Peace Corps Strategic Plan*.

B.8 Comprehensive Agency Assessment

In June 2010, the Peace Corps completed a comprehensive agency assessment that articulated the following strategic vision: *The Peace Corps will be a leader, in partnership with others, in the global effort to further human progress and foster understanding and respect among people*. The assessment also articulated six key strategies:

1. Target our resources
2. Focus on key sectors and train for excellence; measure and evaluate our impact
3. Recruit talented Volunteers committed to service
4. Leverage the impact of Volunteers with special skills
5. Elevate our Third Goal
6. Strengthen management and operations

While all of these strategies are leading to many changes in the way the agency conducts business, the second strategy, in particular, has led to significant revisions in the Peace Corps' approach to programming, training, and evaluation and, thus, changes in the related guidance documents. Through the current agency Strategic Plan, the Peace Corps is optimizing its global impact to meet today's development challenges while continuing its tradition of service.

Select Resources

- 2010 Performance and Accountability Report (PAR)
- Comprehensive Agency Assessment
- Comprehensive Agency Assessment Six Strategies
- FY14-FY18 Strategic Plan

C. Programming Overview

C.1 Programmatic Sectors

All Peace Corps projects fall within six programmatic sectors, which were identified through detailed analysis of the areas of greatest opportunity for meaningful Volunteer work. To provide Volunteers thorough training for these most promising activities and to work toward a coherent set of outcomes, posts develop projects that target a limited set of Volunteer activities within each of the six following programmatic sectors:

- Agriculture
- Community Economic Development (CED)
- Education
- Environment

- Health
- Youth in Development

The project areas and activities that comprise the work in these sectors are illustrated with sector schematics that can be viewed in detail in Part 2.

Each sector has produced sector guidance and a project toolkit. The sector guidance identifies the global niche that Peace Corps has in each sector. Posts then use the sector guidance to determine the most appropriate approach at the post level. The project toolkit provides descriptions and examples for each of the project components—which includes purpose, goals, objectives, and indicators—and also provides sample project frameworks. The sector guidance and each toolkit can be found on the sector page of the Peace Corps intranet under the Programming, Training, and Evaluation Resources.

In addition to the sector guidance and project toolkits, each sector has also produced training packages, sector indicators, and collection tools for the indicators. These tools are intended to provide post staff with strong examples and templates of resources to assist in developing their own projects. Used together, this suite of tools will help posts assess, design, implement, and evaluate strong Peace Corps projects.

C.2 Cross-Sector Programming Priorities (CSPPs) and Initiatives

In addition to project sectors, Peace Corps staff integrate one to four Cross-Sector Programming Priorities (CSPPs) and initiatives as appropriate into their overall post program.

CSPPs are *ongoing*, cross-sector areas of development in which the agency seeks to maximize quality, quantity, and the impact of Volunteer activities *at a global level*. CSPPs are development priorities, identified over the years, in which Volunteers have demonstrated success and encounter opportunities to make a difference. Three of the CSPPs—Gender Equality, Volunteerism, and People with Disabilities—are all stated priorities in the Peace Corps Act, with explicit language stating that the Peace Corps gives "particular attention" to programs, projects, and activities that address each of these areas.

The six Cross-Sector Programming Priorities are:

- Gender Equality and Women's Empowerment (GenEq)
- HIV/AIDS
- Technology for Development (T4D)
- V² Volunteerism
- Youth as Resources
- People With Disabilities

Initiatives are defined as *targeted,* cross-sector, *and time-bound* technical interventions that reflect a regional or global development priority. They are often region- or director-driven. An example of an initiative is *Stomping Out Malaria* in Africa. Initiative-specific guidance is developed by the Office that leads the effort. Initiatives are, at times, tied to a specific partnership and may include their own training and reporting requirements—but they do not replace the importance of CSPPs in the Peace Corps' ongoing development efforts.

Gender: Because gender roles and relations deeply impact the effectiveness of development programs, and promoting gender equality has proven benefits in all sectors, all Peace Corps projects are required to integrate gender considerations into their project design, implementation, training, and reporting, regardless of their CSPP selection. This is explained further in Part 2, and the Peace Corps' forthcoming gender guidance provides simple steps and examples for ensuring strong gender integration.

Select Resources

- CSPP Guidance
- Programming, Training, and Evaluation Resources
- V^2 Volunteerism Action Guide: Multiplying the Power of Service

C.3 New Country Programs

In keeping with the agency's founding principles, Peace Corps Volunteers serve only in those countries where the agency is invited by the host government to work. Such invitations and serious expressions of interest from high-ranking host government officials are sent to the Peace Corps Director. Refer to the Comprehensive Agency Assessment for criteria and priorities considered by the agency when establishing its portfolio of countries where Volunteers are placed.

New Country (or Country Re-entry) Assessment

Before deciding to enter or re-enter a country, the Peace Corps conducts an assessment of the social, political, and security conditions in the country to determine the feasibility of establishing or re-establishing a Peace Corps program. For more information on assessments, refer to the *New Country Assessment Guide*, linked in the *Peace Corps Manual,* Section 340, Opening a Post.

New Country Agreement

Once a decision is made to enter a new country, the Office of the General Counsel is responsible for the negotiation and conclusion of the country agreement, as outlined in the *Peace Corps Manual,* Section 340, with the ministry of foreign affairs of the country. Country agreements have no termination date, but generally can be ended with a 90-day notice by either party.

New Country Entry

The country director (CD) and director of programming and training (DPT) will identify potential project areas during the *New Country Entry Assessment*. Once the decision has been made to enter a new country, they work to finalize the project frameworks and plans. For more information on how the Peace Corps begins new programs, refer to the *New Country Entry Guide.*

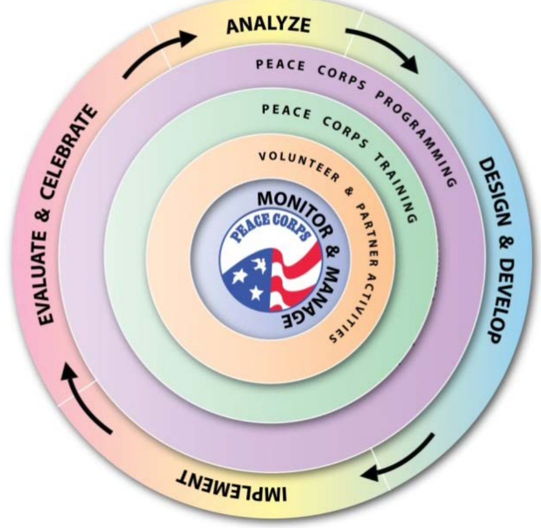
Select Resources

- Peace Corps MS 340: Opening a Post
  - See 2.0 for the following sections:
    - New Country Assessment Guide
    - New Country Entry Guide

C.4 Country Program Strategies

A country program strategy establishes the overarching vision for the Peace Corps' role and describes priority development issues identified by the host country that are appropriate and feasible for the Peace Corps to address, given the resources available. This strategy provides the overall rationale for designing and implementing projects and for training Volunteers. The program strategy is described in each country's strategic plan document and is updated each year. The country program strategy may also outline areas for potential refocusing of projects or areas for potential growth of the Peace Corps in a country.

C.5 Programming, Training, and Evaluation Cycles



Programming is a continually evolving process that includes analysis, design and development, implementation, and evaluation of development projects. Similarly, Volunteer training and activities involve a cycle of analysis, design, implementation, and evaluation. Monitoring of information and management are central to the process. While the process is cyclical, programming, training, and evaluation are best designed with the end in mind, meaning that it is important to be clear about the ultimate results that the post projects aim to achieve.

Quality Volunteer training is essential for Volunteers to gain or refine the knowledge, skills, and attitudes they need to integrate into their communities and to conduct quality work with community members—work that achieves project goals. The Peace Corps Training Design and Evaluation (TDE) process is the agency's version of instructional systems design. The cycle begins with analysis of knowledge, skills, and attitudes needed. Next, Volunteer work continues to be designed, clarified, and developed. Finally, the PT&E cycle moves into implementation, evaluation, and celebration—which feeds back into analysis.

The systems outlined in this *Programming, Training, and Evaluation Guidance* aim to build field staff capacity to lead the implementation of quality PT&E that:

- Maximize the impact of what Volunteers do best.
- Confirm the Peace Corps' relevance and credibility in the 21st century.
- Strengthen our ability to meet evolving host country needs and expectations.
- Anchor the Volunteer experience in effectiveness and success by providing Volunteers with real work and opportunities that they are qualified to perform.
- Facilitate monitoring and evaluation in an environment requiring increased accountability.

How Peace Corps Projects Support Host Country Priorities

C.6 Peace Corps Projects

To implement a country program strategy, posts arrange Volunteers' work around specific sector assistance projects. A Peace Corps project is a set of Volunteer activities in a country, undertaken to meet defined goals and objectives and collaboratively planned with the host country to advance the country's progress toward achieving a public benefit. A project may focus on one sector, such as health, or on an issue across two or more sectors, such as food security. As previously mentioned, projects may also integrate one to four of the agency's Cross-Sector Programming Priorities (CSPPs) such as Volunteerism or People With Disabilities. *Projects are designed so that Volunteers will focus their efforts on activities for which they have been trained and are expected to have a maximum impact on the defined goals, objectives, and activities.*

Peace Corps projects are developed *in partnership* with host country agency partners, typically ministries. The partnership may be with a single agency or several agencies. As partners, all agencies have responsibilities to develop, manage, monitor, and evaluate the project. Without such shared responsibilities, the project does not meet the Peace Corps' development philosophy.

Peace Corps projects are executed in phases of six years. Although a project defines a specific course of action, it can be adapted as it is implemented, based on experience, new developments, and available resources. Prior to the end of each phase, a decision is made whether to continue Peace Corps activities related to the project purpose, and either a new project phase is designed or preparations are made to close the project.

Peace Corps projects are not intended to continue perpetually. The decision to close a project is typically made at post, well in advance of an anticipated closure, and is part of a post's strategic planning process. However, under exceptional circumstances, projects may also be closed more rapidly, for safety, financial, or other reasons and in some cases may be closed at the request of the region. For more information, see Section G.4, Closing a Project, in Part 2: Project Design and Evaluation.

Agreements With Host Country Ministries or Departments

Each Peace Corps project should operate under an agreement signed at the national level with the host country government. These agreements ensure that the Peace Corps stays engaged with the host country government, and they add credibility to the Peace Corps' work in the country. Most often, these agreements are memoranda of understanding (MOUs) with a relevant ministry or ministries. MOUs that establish a clear understanding of the goals, objectives, and working relationship between the Peace Corps and host ministries help to manage expectations and affirm the host government's support of the Peace Corps' work in the country. For more information on establishing in-country agreements, refer to MS 103 which establishes guidelines for in-country strategic partnerships.

Part 2: Project Design & Evaluation

- Introduction to Peace Corps Project Design and Evaluation
- Programming and Evaluation Organization Process
- Step 1: Analyze the Situation
- Step 2: Develop or Revise the Project Approach
- Step 3: Define or Revise the Project Implementation Plan
- Step 4: Develop Monitoring, Reporting, and Evaluation Plan
- Step 5: Project Documentation, Communication, and Close-out

A. Introduction to Peace Corps Project Design and Evaluation

The Peace Corps is invited to the countries in which it serves to address a particular development priority. Each post creates a country program strategy articulating the prioritized development issues identified by the host country that are appropriate and feasible for the Peace Corps to address.

The Peace Corps implements each country's program strategy through sector assistance projects. This section of the *Programming, Training, and Evaluation Guidance* (PT&E Guidance), Part 2: Project Design and Evaluation, assists field staff to design new or revise existing Peace Corps projects. By the end of this section, you will be able to complete a new or revised project plan, including a project framework, and prepare components for the monitoring and evaluation action plan.

PT&E staff use the project design and evaluation process to help Volunteers effectively address the development priorities of their communities. As staff develop and refine projects, they identify the most technically sound and promising Volunteer activities, as well as the types of sites, training, and partners that support those activities. Staff also use the PT&E Guidance to support Volunteers as they make a visible and lasting impact on the communities of their host countries, fulfilling the three goals of the Peace Corps.

A.1 Peace Corps Projects

Peace Corps projects support host country efforts to address particular development issues in a targeted fashion and with measurable results. **A Peace Corps project is a set of Volunteer activities in a country, undertaken to meet defined goals and objectives, collaboratively planned with the host country to advance the country's progress toward achieving defined benefits.** While associate Peace Corps directors (APCDs) and project managers (PMs) oversee Peace Corps projects, in-country Project Advisory Committees (PACs), technical specialists, and other staff members at Peace Corps contribute to project development, implementation, and evaluation through a participatory process. Peace Corps staff and host country partners work in tandem to design projects that embrace a long-term vision of positive change.

A project can fall into one of the Peace Corps' six development sectors, such as Health, or it can target an issue that crosses two or more sectors, such as food security, which relates to the Agriculture, Youth, Environment, Health, and Community Economic Development sectors. Projects may also integrate one or more of the agency's Cross-Sector Programming Priorities (CSPPs), such as Volunteerism or People with Disabilities. Projects are designed so that Volunteers can focus on activities for which they have been trained and which are expected to have a maximum impact on the pre-defined goals. The project design process incorporates an examination of sector-specific promising practices and a wide variety of global evidence, in addition to previously successful Peace Corps projects demonstrating positive and sustainable outcomes.

Each sector has its own guidance, which identifies the Peace Corps' strategic role in that sector as well as examples of successful project activities. Each sector also has a project toolkit, which provides templates for the various project components, including the purpose, goals, objectives, and indicators. Toolkits are located on the Peace Corps intranet's sector pages under Programming, Training, and Evaluation Resources.

Project Plans

A project plan defines the Peace Corps' strategy for sector assistance in a specific country. It defines the purpose, goals, and objectives for Volunteer and partner activities for the entire post. A project plan also describes the tasks and activities that Volunteers and partners will undertake, as well as the monitoring, reporting, and results-based indicators used to assess progress toward the project's objectives. A project plan helps Peace Corps staff identify training needs for Volunteers, and it can be adapted throughout its implementation, based on experience, evidence from monitoring and evaluation data, new developments, and available resources. The development of a quality project plan can have a direct influence on the quality of Volunteer training and work, monitoring and evaluation data, and the achievement of community-based development goals.

In Part 2 of the PT&E Guidance, you will walk through the processes for creating a strong project. Strong documentation through a project plan helps to build an understanding of project goals, objectives, and strategies on the part of host agencies, staff, and Volunteers. A suggested outline for a project plan is described below. The core text of the project plan should cover each component and be concise (no more than 18 to 20 pages). Parts of it, including the executive summary and the framework, should be translated, distributed to local partners, and updated as changes are made.

Project Plan Outline

Executive Summary

Part 1: Project Background

- 1.1 Project Development
- 1.2 Situation Analysis

Part 2: Project Role

- 2.1 The Peace Corps' Niche
- 2.2 Summary of What Volunteers Will Do
- 2.3 Project Framework

Part 3: Implementation Plan

- 3.1 Principal Partners
- 3.2 Strategy for Site Selection and Assignment
- 3.3 Numbers and Skills of Volunteers

Part 4: Overview of Training

Part 5: Summary of MRE Action Plan

Part 6: Task Analysis

Required Appendix

- Sector Terminal Learning Objectives

Optional Appendix:

- History of Project Development

Select Resources

- Project Plan Checklist
- Project Plan Section Instructions

Project Design

Well-designed projects draw from national policy or strategy, community engagement, and sector-specific evidence of impact. They also recognize the unique nature of the Peace Corps' principal resource: the Volunteer. Sector guidance and project toolkits help identify the elements of effective Peace Corps projects. A project plan reflects the Peace Corps' anticipated contribution to host country goals and efforts for a particular sector or cross-sector set of activities.

Peace Corps sector assistance projects are developed *in partnership* with host country agency partners. The partnership may be with a single agency or several agencies, and it is often with government ministries. As partners, all agencies have responsibilities to develop, manage, monitor, and evaluate projects. Without these shared responsibilities, projects do not meet the Peace Corps' development philosophy.

Each Peace Corps project ideally operates under an agreement that is signed at the national level with the host country government. These agreements ensure that the Peace Corps stays engaged with the host country government and with the national priorities, and they add credibility to the Peace Corps' work in the country. Most often, these agreements are memoranda of understanding (MOUs) with a relevant ministry or ministries. MOUs that establish a clear understanding of the goals, objectives, and working relationship between the Peace Corps and host ministries help to manage expectations and affirm host government support of the Peace Corps' work.

Project Duration and Project Phases

Peace Corps projects operate according to six-year phases. Although every project defines a specific course of action for each phase, this course can be adapted throughout its implementation, based on experience, new developments, and available resources. Prior to the end of each phase, a decision is made to continue Peace Corps activities related to the project purpose, and either a new project phase is designed or preparations are made to close the project.

Peace Corps projects are not intended to continue forever. The decision to close a project is made as an integral part of a post's strategic planning processes. Normally, this decision is made well in advance of a project's closure and is part of a post's Integrated Planning and Budget System (IPBS) process. However, under exceptional circumstances—such as for safety, financial, or other reasons—projects may also be closed more rapidly.

Project Assessment and Revision

The purpose of project monitoring and evaluation is to provide data that can be used to share the value of Peace Corps work and to support evidence-based decision making for project improvement. Monitoring, reporting, and evaluation (MRE) functions operate in tandem with programming and training, as the analysis of data collected using rigorous MRE processes informs program and training revisions.

A.2 Peace Corps Project Criteria

The Peace Corps strives to ensure that all projects meet the following criteria:

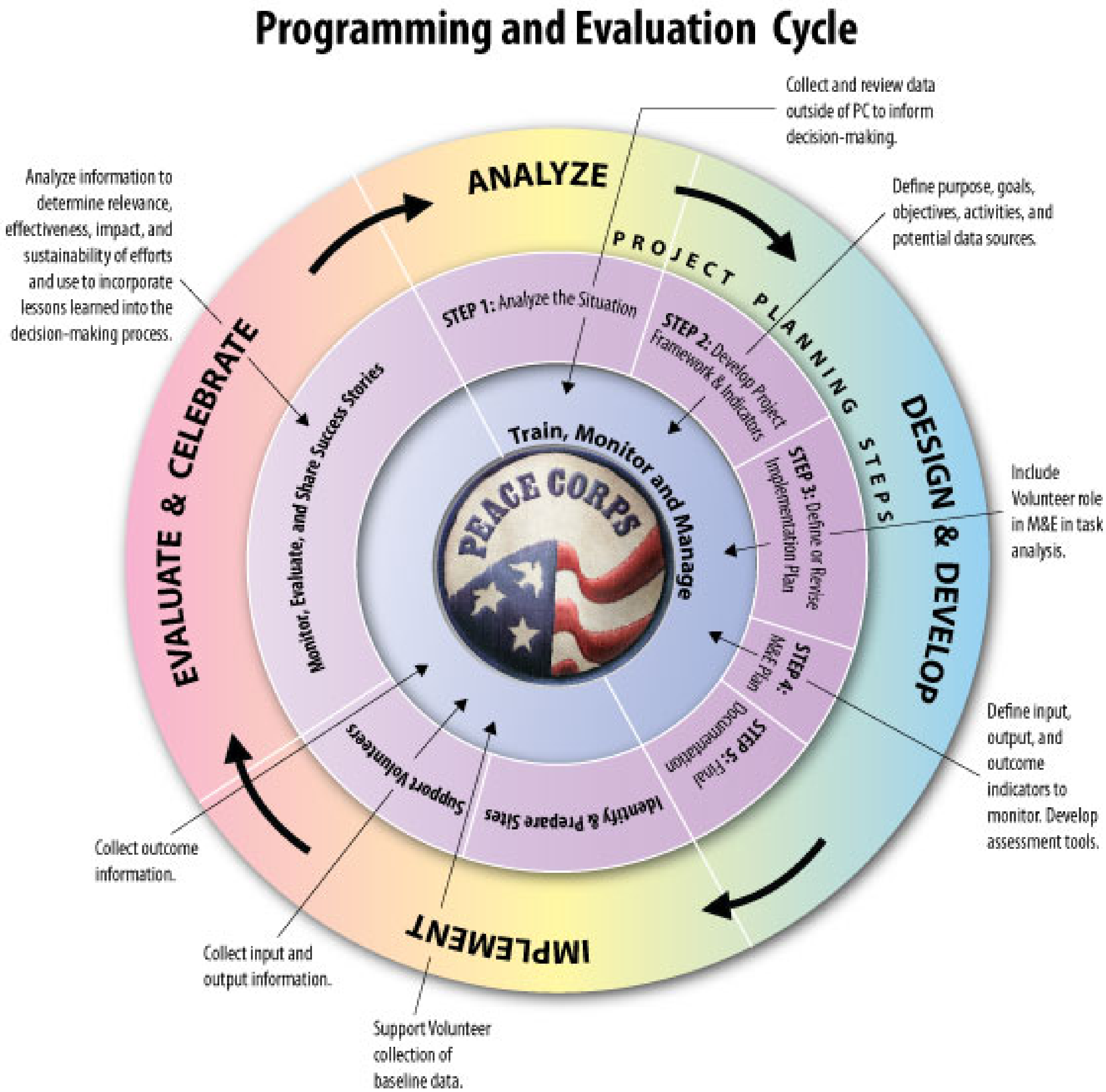
A Strong Project …

1. Increases local capacity in a demonstrable way.
2. Strives to address expressed priorities of those who have limited access to resources and opportunities.
3. Seeks sustainable results that complement other development efforts.

4. Is focused according to the project's sector guidance so that Volunteers are well-trained to implement specific activities with their partners that are targeted to make a recognizable difference.
5. Includes local participants as partners in designing, implementing, monitoring, and evaluating the project.
6. Addresses Peace Corps Cross-Sector Programming Priorities (CSPPs) and initiatives as appropriate, drawing on an analysis of gender relationships and promoting women's participation to increase their status and opportunities.
7. Places Volunteers where they engage with those they serve and where their skills match locally identified needs.
8. Does not substitute Volunteers for qualified and available host country workers.
9. Uses the types and numbers of Volunteers that are consistent with available applicants.
10. Has local Peace Corps staff and resources to train and support Volunteers.
11. Has host government agencies, civil society organizations, and communities as partners that can support the project and the Volunteers.
12. Is continuously evolving.

B. Programming and Evaluation Organization Process

Programming is an iterative, continual improvement process that includes analysis of information, planning and design, revision of projects, implementation, and evaluation. The graphic below illustrates these steps. Monitoring programs and activities, collecting and analyzing data, and evaluating information is central to the process, enabling evidence-based decision making to determine that Volunteers are engaged in the right project activities, working toward the most important possible outcomes, and receiving the most effective training. Part 2 of this guide is organized into a set of sequential steps. However, because monitoring, reporting, and evaluation should be integrated into every step of the process, consider reviewing Part F, Step 4: Develop a Monitoring, Reporting, and Evaluation Plan, prior to taking the actions outlined in Step 1. This will ensure that actions taken in Steps 1, 2, and 3 are well-informed by a thoughtful MRE strategy.



B.1 Who Is Responsible?

The director of programming and training (DPT) for a post generally leads the planning and design of new projects, and a project manager or the associate Peace Corps director leads the on-going project planning process; regional advisors (RAs) may also play a role. Peace Corps Washington (PC/W) staff, including the regional chief of programming & training (ChiPT) and sector specialists from the Office of Overseas Programming and Training Support (OPATS) and the Office of Global Health and HIV (OGHH), review new proposed project plans, as these plans usually have significant funding implications.

For existing projects, plans are revised by the appropriate APCD or PM and reviewed by the DPT or country director (CD). Final approval requires review by PC/W staff and should be discussed with the regional ChiPT.

In all cases, the director of management and operations (DMO) must be involved in any decisions with funding or administrative implications.

PC/W regional, OPATS, and OGHH staff members provide technical, operational, programmatic, and MRE advice throughout the design and revision process. They are intimately familiar with the sector guidance and toolkits and can assist post staff in using them. It is particularly important for post staff to communicate with PC/W on the types of Volunteers needed and the development of the Job Specific Requisition (JSR).

The Peace Corps stresses a participatory approach to project design and revision, since participatory decision making is at the heart of the Peace Corps' philosophy of development. Volunteers, host country partners, community representatives, training staff, relevant cross-sector specialists, and the Gender Equality and Women's Empowerment (Gen/Eq) point of contact must play strong roles in both initial project planning and any revisions.

B.1.1 Involving Host Country Partners

Peace Corps projects support host country priorities at the national and local levels. Partners must take part in designing the project plan and should remain involved throughout the implementation and evaluation processes to ensure that Peace Corps projects:

- Have shared ownership;
- Address local and national priorities;
- Implement activities that will be effective; and
- Achieve results that will be sustainable.

Host country partners are primarily engaged in project design through one-on-one communication and Project Advisory Committees (PACs), which are discussed further in Section B.1.3, Project Advisory Committees. Participation in training events also engages partners and may serve as an additional opportunity for their input into project design.

B.1.2 Involving Volunteers

Volunteers can provide valuable insights into the design of project activities, secondary or pilot activities, and training. Peace Corps staff can engage with Volunteers directly through individual discussions, group meetings at Volunteer events, and interactions with Project Advisory Committees (PACs). Staff also gain input from Volunteers through the Annual Volunteer Survey (AVS), Volunteer Report Forms (VRFs), and close-of-service reports and interviews. Volunteer leaders can be valuable assets as members of PACs and by participating in programming, training, and evaluation activities and improvements.

B.1.3 Project Advisory Committees

A Project Advisory Committee (PAC) is the "voice of key project stakeholders" that helps the Peace Corps ensure that it develops credible, realistic, and responsive project plans and training programs. A PAC should be established for each new project and should remain active throughout the life of a project. This committee shares responsibility for the design, evaluation, and revision of the project. The committee should meet at least once during the design of a new project and at least annually thereafter. For a new project that does not yet have a PAC, a stakeholders' group or workshop may temporarily fulfill the role of a PAC.

A PAC should include at least the following individuals:

- Peace Corps APCD or program manager
- One national or regional government program representative
- One international or national partner agency representative with expertise in the sector
- One supervisor (local partner organization representative) or work partner/counterpart
- One Peace Corps training staff member
- One community representative (e.g., teacher, religious leader, young person)
- One Volunteer: second- or third-year Volunteers often make strong members (unless there are no Volunteers in-country yet)
- One person with a strong understanding of gender and development (often the Peace Corps Gen/Eq point of contact)

Please refer to Section F.3.5, PAC Meetings, of this guide for more discussion on the role of PACs in MRE and this sample PAC agenda for ideas on how to structure committee meetings.

B.2 The Project Design and Revision Schedule

The table and figures on the following pages illustrate processes for designing a new project or significantly revising an existing project. In most cases, project development does not follow this exact path, so each post should develop its own schedule—adapted to local circumstances—noting the important benchmarks below and consulting with the appropriate PC/W regional office ("Region") when necessary (required for new projects). In particular, note that the deadlines for a new Job Specific Requisition (JSR) and for a Volunteer assignment description (VAD) can greatly influence the timing of implementation.

B.2.1 Timeline and Steps

Timeline for Developing New Projects

A project is considered new if it moves in a completely new direction or into a new sector. For example, if there is a change in the primary partner from the ministry of education to the ministry of youth and sports, the project may change sectors. For simplicity, the timeline for developing new projects does not include the use of Peace Corps Response Volunteers or a pilot project phase, and it assumes that the new project is in a country where the Peace Corps has a functioning program. In practice, some countries have used Peace Corps Response to start activities in a new sector, especially to help with initial assessments and setting up technical aspects of the program design. Project development takes between four and 12 months, after which another two to four months should be allowed for training design prior to the arrival of Volunteers.

Timeline for the Formal Review and Revision of an Existing Project

This timeline assumes that the revision process for existing projects includes a formal project review, discussed in **Section C.3.1, Project Reviews**. The schedule for project revisions varies.

Timeline for Ongoing Annual Adjustments and Revisions of an Existing Project

Existing projects are generally reviewed annually for minor adjustments and revisions prior to the arrival of new Peace Corps trainees to ensure that assignments reflect the current project status.

Timeline and Process for Other Situations

If a project does not fit the above scenarios, the timeline and process can be modified on a case-by-case basis and in consultation with Region. Examples of other situations include the revision of a project without a formal review and the development of a new project that is a subset of an existing project.

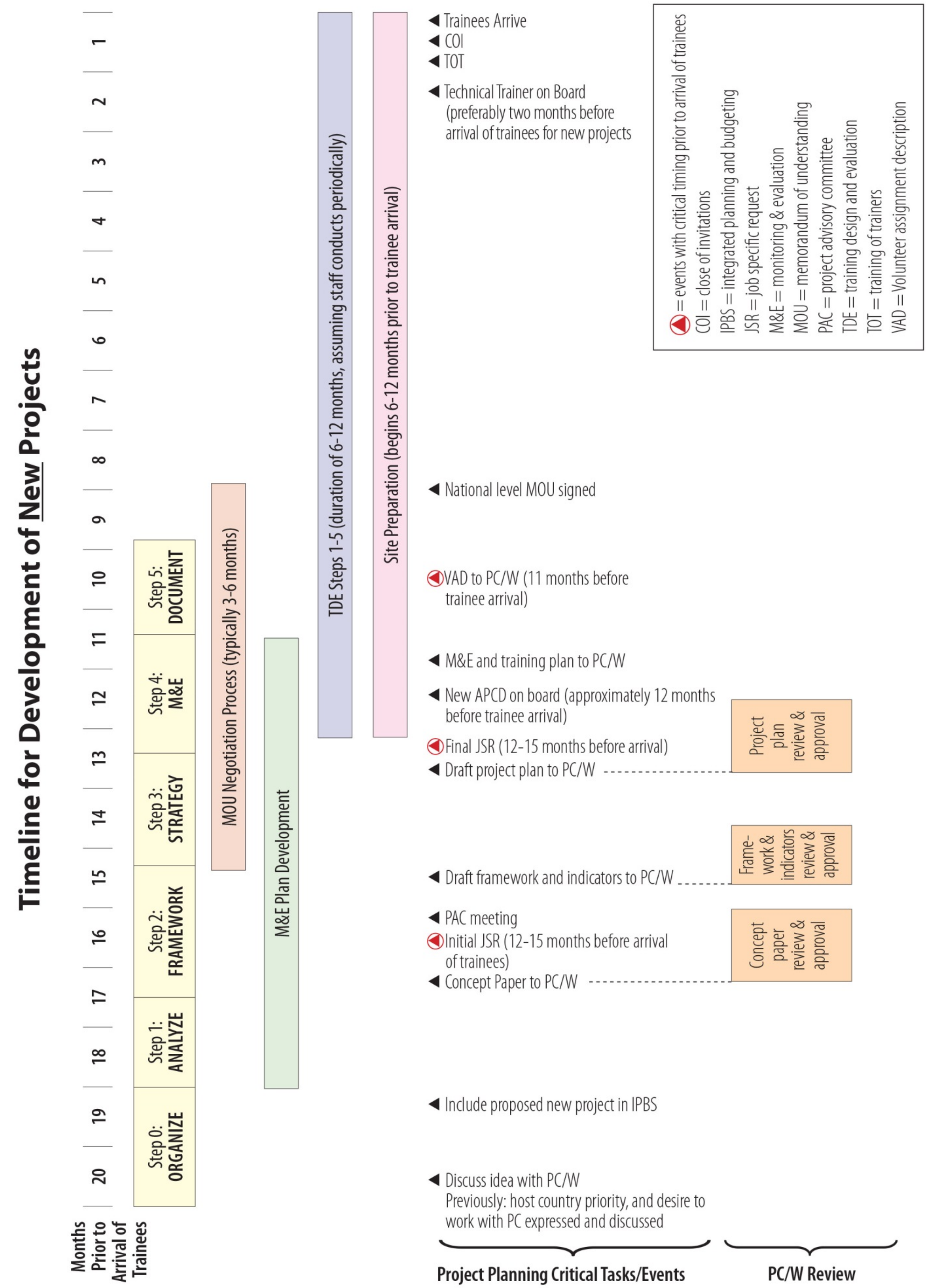
Process for Developing a New Project or Revising an Existing Project

	Develop a New Project	**Revise an Existing Project**	
Organize the Process	• Host country expresses a desire for PC support in the issue area. Post discusses potential PC role with the host country. • Post conducts informal discussions with Region for initial permission to explore a new project. • Post formally indicates its intention to start a new project in its IPBS. The IPBS should include the rationale for the new project, timelines for adding a new APCD/PM, the number of Volunteers required, and training plans. • Assemble a PAC (or a potential PAC).	• Define roles for Peace Corps staff, Volunteers, and host country partners. • Develop a schedule with deadlines for decision making or the completion of activities. • Submit a technical activity description (TAD) for a project review, if appropriate, or to solicit technical specialist expertise in design.	**Preparation**

Step 1: Analyze the Situation	• Review the guidance for the anticipated project sector and the CSPP guidance selected by post. Speak with technical specialists in OPATS about current trends and program evidence from the industry. Review the sector schematic to understand core project activities. • Collect and analyze information on the current situation of the project sector in the host country as well as information on successes/lessons learned from current Volunteers and other organizations' activities related to the proposed project area. • Use the "gender analysis for project design tool" in the Peace Corps gender guidance (forthcoming) as well as other analyses in the country and sector to identify the gender-based constraints that will affect project implementation. • Collect and analyze information with PAC members for greater context. • Determine possible project activities that match what Volunteers can do well and that will result in positive community-level outcomes.	• Review programming, training, and evaluation data and feedback, including the Annual Status Reports (SRs). • Assess developments in the sector, host country priorities, and related local issues that might affect the relevance or impact of the project. • Use the "gender analysis for project design tool" from the Peace Corps gender guidance (forthcoming). Analyze the existing project's disaggregated data as well as other analyses of gender in the country and sector to identify the gender-based constraints that will affect project implementation. • Analyze areas of opportunity to strengthen Volunteers' work in post-selected CSPPs. • Convene the PAC if appropriate. • Review the Annual Volunteer Survey (AVS) for Volunteers in the current project, if appropriate. Prepare other Volunteer assessment tools, such as surveys, and interview focus groups to review project activities and training. • Develop methods to gather information (surveys, interviews, focus groups, etc.) from project stakeholders and beneficiaries. • Compare current project activities to sector schematics and project areas.	**Analysis**

Step 2: Develop or Revise the Project Framework and Indicators	• Develop a concept paper. • Send the concept paper to the regional chief of programming (ChiPT) for review and approval to move forward. The ChiPT consults with OPATS and OGHH when possible. • Hold a PAC meeting. • Consider the post-selected CSPPs and their integration into the project framework. • Send the revised project framework to PC/W (via regional desk or ChiPT) for review. • Review the Peace Corps gender guidance (forthcoming) for integrating gender considerations into the project framework.	• Hold a PAC meeting. • Update the JSR. • Participate in project review (which includes extensive visits to the field). • Update the framework and indicators. Ensure that the Standard Indicators (SIs) are applicable to the project. • Consider the post-selected CSPPs and their integration into the framework. • Revise the implementation strategy or define further details, as appropriate. • Send the revised project plan to PC/W.	**Framework and Indicators**
Step 3: Define or Revise the Implemen-tation Strategy (Sites, Partners, Volunteers, Tasks, Training, and Resources)	• Define criteria for the project's location, necessary Volunteer skills, host country partners and counterparts, required resources, and major Volunteer tasks. • Upon approval, submit an initial Job Specific Requisition (JSR) form. Note: **VRS should receive the JSR four quarters before the trainees are scheduled to arrive at post.** • Identify opportunities to implement CSPPs. • Further develop partnerships with host country nationals and other organizations, and begin the site identification process. • Begin the process for agreement(s) with a host government ministry or agency with the intent of signing a memorandum of understanding (MOU). • Develop and send a draft project plan (including the project framework) to PC/W for review.	• Identify opportunities to implement CSPPs (review agency guidance if available). • Revise and strengthen the MRE plan based on changes to the framework and project plan. • Review or revise the implementation strategy based on data analysis. This might include revisions to site development strategy, partner preparation tasks, Volunteer training, etc. • Send proposed revisions to PC/W for review.	**Preliminary Plan**

Step 4: Develop or Revise the MRE Plan	• Develop the MRE plan based on applicable Standard Sector Indicators (SIs) and Post-Developed Indicators (PDIs) included in the framework. • Plan to collect data related to gender impacts (including gender/age disaggregation), selected CSPPs, and initiatives, such as food security. See the MRE Toolkit for guidance and links to data collection tools developed by PC/W.	• Review the MRE action plan based on applicable Standard Sector Indicators (SIs) and Post-Developed Indicators (PDIs). • Refine or revise the MRE plan to collect data related to gender impacts (including gender/age disaggregation), selected CSPPs, and initiatives, such as food security. See the MRE Toolkit for guidance and links to data collection tools developed by PC/W.	**Preliminary Plan**
Step 5: Final Document ation	• After receiving feedback from PC/W, revise the project plan. • Update the JSR (if feasible per the JSR timetable). • Create supporting documents and tools, including a VAD. • Create data collection tools for Volunteers. • Upload the framework to the Volunteer Reporting Tool (VRT).	• Based on review feedback, make any final revisions to the project plan. Be sure that all related documents are updated, including the JSR (if feasible per the JSR timetable), VAD, and VRT or data collection tools. • Communicate changes. Renew or update national-level MOUs as appropriate.	**Final plan**


Timeline for Development of New Projects
Months Prior to Arrival of Trainees
20 19 18 17 16 15 14 13 12 11 10 9 8 7 6 5 4 3 2 1
Step 0: ORGANIZE
Step 1: ANALYZE
Step 2: FRAMEWORK
Step 3: STRATEGY
Step 4: M&E
Step 5: DOCUMENT
MOU Negotiation Process (typically 3-6 months)
M&E Plan Development
TDE Steps 1-5 (duration of 6-12 months, assuming staff conducts periodically)
Site Preparation (begins 6-12 months prior to trainee arrival)
Trainees Arrive
COI
TOT
Technical Trainer on Board (preferably two months before arrival of trainees for new projects
National level MOU signed
VAD to PC/W (11 months before trainee arrival)
M&E and training plan to PC/W
New APCD on board (approximately 12 months before trainee arrival)
Final JSR (12-15 months before arrival)
Draft project plan to PC/W
Draft framework and indicators to PC/W
PAC meeting
Initial JSR (12-15 months before arrival of trainees)
Concept Paper to PC/W
Include proposed new project in IPBS
Discuss idea with PC/W
Previously: host country priority, and desire to work with PC expressed and discussed
Project plan review & approval
Frame-work & indicators review & approval
Concept paper review & approval
Project Planning Critical Tasks/Events
PC/W Review
= events with critical timing prior to arrival of trainees
COI = close of invitations
IPBS = integrated planning and budgeting
JSR = job specific request
M&E = monitoring & evaluation
MOU = memorandum of understanding
PAC = project advisory committee
TDE = training design and evaluation
TOT = training of trainers
VAD = Volunteer assignment description

B.2.2 Pilot Projects

One option to consider when developing a project is to start with a pilot project. This is a way to start small and build on successes. It may involve two or three Volunteers spending a third year in new assignments related to a potential new project, or using Peace Corps Response to build a foundation for future programming with two-year Volunteers. In other cases a small number of Volunteers with new skills may be recruited and sent to a country to help inform the planning process. If this option is selected, it is important to develop a schedule and plan for analyzing the pilot phase before automatically expanding the project. The post staff should work closely with PC/W (regional, OPATS, and OGHH staff) to design and implement appropriate implementation and assessment methods and tools for piloting the project.

B.2.3 Memoranda of Understanding (MOUs) With Ministries or Departments

Each Peace Corps project should ideally operate under an agreement that is signed by the host country government at the national level. These agreements ensure that the Peace Corps stays engaged with the host country government, and they add credibility to the Peace Corps' work in the country. Most often, these agreements are memoranda of understanding (MOUs) with a relevant ministry or ministries. While Peace Corps projects may operate without ministry oversight or MOUs (in some cases, circumstances may not be conducive to establishing a national-level MOU), it is highly recommended that every project have a current national- or ministry-level MOU. MOUs that establish a clear understanding of the goals, objectives, and working relationship between the Peace Corps and host ministries help to manage expectations and affirm the host government's support of the Peace Corps' work. National- and ministry-level MOUs can be established for a maximum period of five years. Section 103 of *the Peace Corps Manual* and the *New Country Entry Guide* both provide additional guidelines for the development and management of in-country agreements.

Some posts may choose to establish an agreement with a national-level government body, such as the department of secondary education, in addition to, or instead of, an MOU with a national ministry, such as the ministry of primary and secondary education.

C. Step 1: Analyze the Situation

This section outlines actions for conducting the analysis phase of both project development and project revision. The first section, C.1, outlines the steps for analysis that are most relevant for new projects. Section C.2 includes considerations that apply to both new and existing projects. Finally, the last section, C.3, includes information that is relevant to conducting both formal project reviews and less formal revisions of existing projects.

C.1 Analysis for New Projects

For both the revision of existing projects and the development of new ones, the host country government, existing and potential partners, communities, Peace Corps staff, and Volunteers are all involved in the analysis and design process.

For a new project, Peace Corps staff members at post determine what national- and community-level priorities are and what the focus area of the project should be. They define the type and level of impact that Peace Corps Volunteers can hope to make while surveying existing efforts to address the issue. Peace Corps staff then define an appropriate role for Volunteers. This is a critical time for developing relationships with a host country agency, civil society, and community partners. If planned thoughtfully, the analysis process should yield valuable baseline data that can help capture the results of Peace Corps efforts over time. At the completion of this step, post staff members present a concept paper for Region's approval to ensure the availability of resources prior to developing the project.

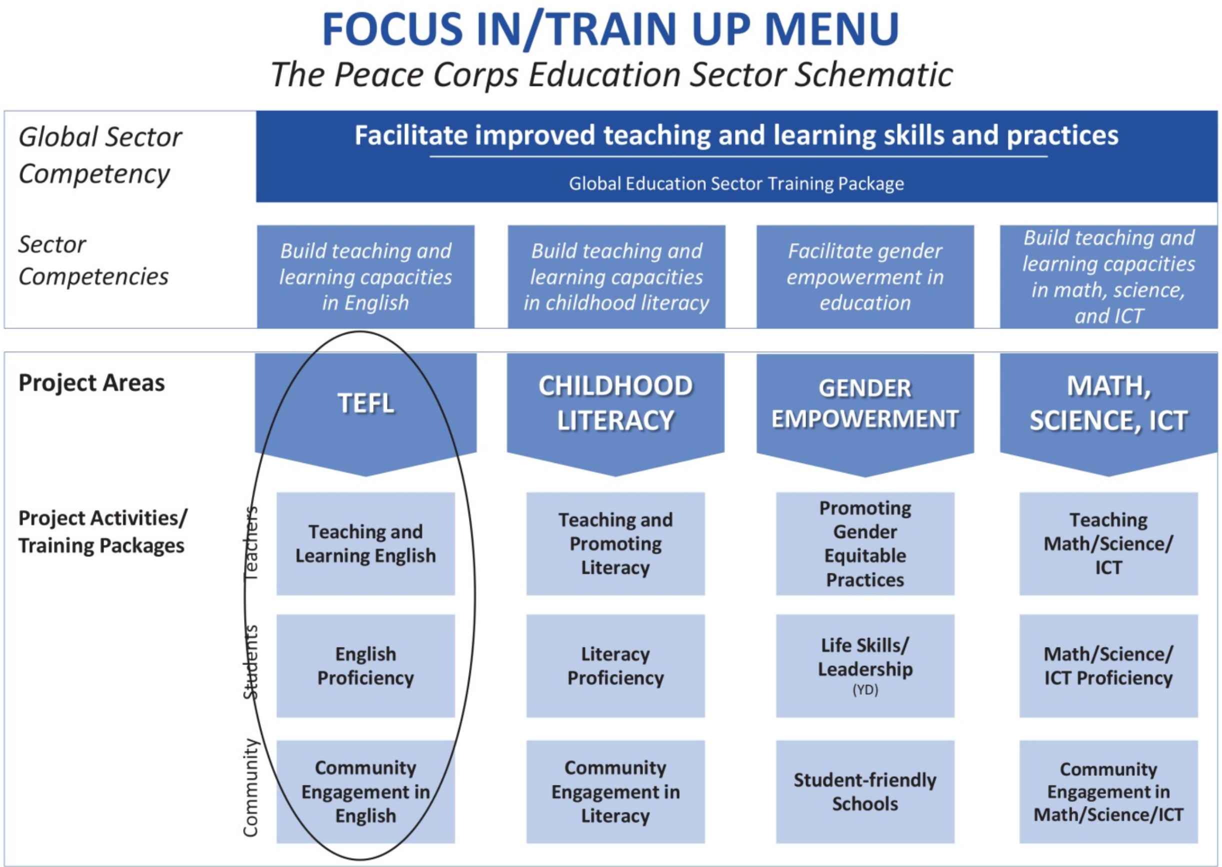
C.1.1 Refer to the Sector Schematics and Determine the Project Area(s) or Issue

One of the key functions of a project plan is to focus Volunteer and partner work on a limited set of goals, objectives, and activities. A well-designed Peace Corps project plan focuses on a few specific issues and desired outcomes. With a focused project, a post can provide more in-depth technical training, it can share clear expectations with host country partners, and it can determine roles more easily. Over the life of a project, engagement with partners often deepens from local to institutional levels, with associated opportunities for outcomes to combine into a significant impact on sector development. In this way, targeted programming can have a significant effect on key institutions in a particular sector (e.g., how a ministry of education approaches teacher assessments).

In many cases, senior decision makers use existing information and the host government partner's request to determine the broad, general focus of a project prior to beginning the analysis. In other cases, the choice about the focus area of a project is made as part of the analysis.

Peace Corps projects focus on one or two sectors and on limited areas in which Volunteers have an established record of successful engagement. As explained in Part 1, Peace Corps works in six sectors, the schematics for which can be found below, illustrating project areas and activities for each. As shown in the first schematic of the education sector, post staff select the most appropriate project areas. Staff involved in the analysis should be sure to read the relevant sector guidance to better identify effective Volunteer activities, partners, and sources of data that can inform in-country analysis. In addition to the sector guidance, post staff may also want to review the related CSPP guidance for the post-selected CSPP(s). This can provide additional assistance in identifying the areas of greatest opportunity. For more information, see the CSPP resources page on the Peace Corps intranet.

Example:



C.2 Analysis for New and Revised Projects

After determining or reaffirming the likely project area and/or potential project activities that align with that area, the next step is to gather relevant in-country data that relate to the proposed or current project areas. Because of the Peace Corps' approach to development, it is essential that this phase take into account both gender-sensitive and asset-based approaches to development.

C.2.1 Review Available Data and Resources

After determining the likely project area(s) and/or potential project activities that align with that area, the next step is to gather relevant in-country data (including data broken down by sex and age when possible). Start the analysis by reviewing material that has already been prepared. These documents can provide information on host country priorities, the current status of issues and plans, factors affecting the issues, as well as information on how particular groups or geographical areas differ with respect to those issues. Information from a diverse range of stakeholders (e.g., the host government, U.N. agencies, the U.S. Agency for International Development [USAID], other NGOs, the World Bank, etc.) and gender/age disaggregated statistics can provide a broad picture of the sector. As you review this data, consider jumping ahead and reading Section D.4.2, Project Goal Baselines and Targets, to keep in mind potential sources of baseline data that will help determine the results of the project.

Examples of helpful documents include:

Host Country Documents

Multi-Year Development Plans

- Specific planning documents from individual ministries with information about issues and priorities
- National statistics and data
- Country-level gender analysis

Project or Annual Reports From USAID, United Nations Organizations, the World Bank, and Other NGOs

- The State of the World's Children, UNICEF
- The Progress of Nations, UNICEF
- *Annual Report*, the World Bank
- Human Development Report, UNDP
- Reports from the Economist Intelligence Unit (EIU)
- Demographic and Health Surveys (DHS) from USAID's MEASURE DHS project
- USAID gender analysis reports, by country
- The World's Youth Data Sheet, Population Reference Bureau
- Organizational websites (Many of these multilateral and development organizations post country-specific plans and reports.)

Peace Corps Documents

- Sector and CSPP guidance for the current or proposed sector.
- The country program strategy, which is outlined in each post's Integrated Planning and Budget System (IPBS) document, includes a description of stated host country needs and priorities, and it identifies which development issues or sectors are priority areas for Peace Corps work.
- The post's status reports, including those on project(s), CSPPs, training, and partnerships.
- Global sector, CSPP, and training summary reports.

The Peace Corps sector and CSPP guidance are also useful for reviewing current evidence-based activities. Reviewing what is currently being done—as well as what could potentially be done—by whom, in what geographical areas, and for which target groups will help define a Peace Corps strategy that maximizes Volunteer effectiveness in supporting host country priorities and activities.

C.2.2 Use Gender-Sensitive Analysis

As part of the project analysis, it is important to consider the gender norms and possible constraints that will affect implementation and to identify ways of improving the disparities in access to resources, skills, and opportunities. Data broken down by sex and age can help inform this process. The Peace Corps gender guidance (forthcoming) provides a gender analysis tool in Annex A that walks staff through the process of basic gender analysis and includes links to report sources and data.

For each target population, the essential questions are:

- What are the gender roles?
- Who has access to resources, benefits, and opportunities?
- Who controls or makes decisions about resources, benefits, and opportunities?
- What are the cultural expectations that affect males and females?

For more guidance, tools, and resources on how to integrate gender analysis into project development or revision, see the Gender Equality and Women's Empowerment landing page on the Peace Corps intranet.

C.2.3 Take an Asset-Based Approach

The Peace Corps develops projects that help communities address problems, such as the spread of HIV/AIDS, environmental contamination and degradation, and malnutrition. Yet the approach the Peace Corps takes to address these problems focuses on deriving solutions from the hopes, strengths, and resources found in communities.

At the community level, Volunteers use appreciative inquiry and asset-based approaches to achieve locally led and sustainable solutions. Appreciative inquiry is an organizational behavior model that inspires and motivates people to get involved and contribute. Asset-based approaches promote an appreciation of certain groups, such as young people, people with disabilities, and other marginalized groups, so that they are not viewed as "problems," but rather as resources and potential agents of positive change. Asset-based approaches ask us to look for possibilities and strengths rather than problems and deficits.

For more on asset- and problem-based approaches, please refer to *Roles of the Volunteer in Development, Volunteer as Learner* (No. T1005) and the *New Project Development and Management Workshop Training Manual* (No. T0107, Session 2: Assets and Deficits).

Peace Corps staff use appreciative inquiry tools throughout project design and analysis. In Project Advisory Committee (PAC) meetings and stakeholder workshops, participants describe their vision of successful Volunteers, successful community activities, and a successful project. In the analysis stage, APCDs/PMs continue to use appreciative inquiry methods to identify successful community-led efforts on which they can build projects.

C.2.4 Prepare Surveys, Interviews, and Other Information Gathering Materials

There are a variety of methods that can be used to gather information from people, including surveys, field observations, interviews, and focus groups. For more information, please see the MRE Toolkit, "Data Collection Tool Development Guidance," Appendix I. Take some time to plan the format and content for group discussions and interviews. Be sure to employ an asset-based approach and take gender analysis into consideration when designing interview questions. Careful planning will help ensure that the right information is collected in the most efficient way. See Section C.3.1, Project Reviews, for additional guides on preparing interviews, surveys, and other tools for project revisions. See the *New Country Entry Guide* for questions on new project development.

C.2.5 Plan Field Visits and Interviews

Interviews and field observations are excellent methods both for learning about development issues and plans and for developing partnerships. Your initial contacts can help prepare a list of appropriate people to interview. The list should include people in official positions, such as ministry personnel, as well as community members and representatives of potential stakeholder groups. Every project analysis must include host country voices of both men and women at the community level to verify community perceptions, priorities, and assets available to contribute to the project. If young people are likely to be the primary beneficiaries of the project, make sure they are included in the analysis. It is important to listen to a representative group of stakeholders, so you should consider asking key partners to join you for interviews. A list of potential people to interview includes:

- Ministry officials and other host country representatives
- Nongovernmental organization (NGO) staff members
- Development agency (international and host country) staff
- Peace Corps post staff members
- Volunteers' community members (including young people) and local officials

C.2.6 Analyze the Information

Once information and data have been gathered from stakeholders and reports, the next step is to analyze that information with both the PAC and Volunteers. Most posts schedule these analysis meetings regularly. During the analysis, different opinions should be welcomed to encourage creative thinking. Organizing the information may help to stimulate discussion or raise the need for additional information to define or understand underlying factors affecting priority issues. Questions to guide the analysis of the information gathered include the following:

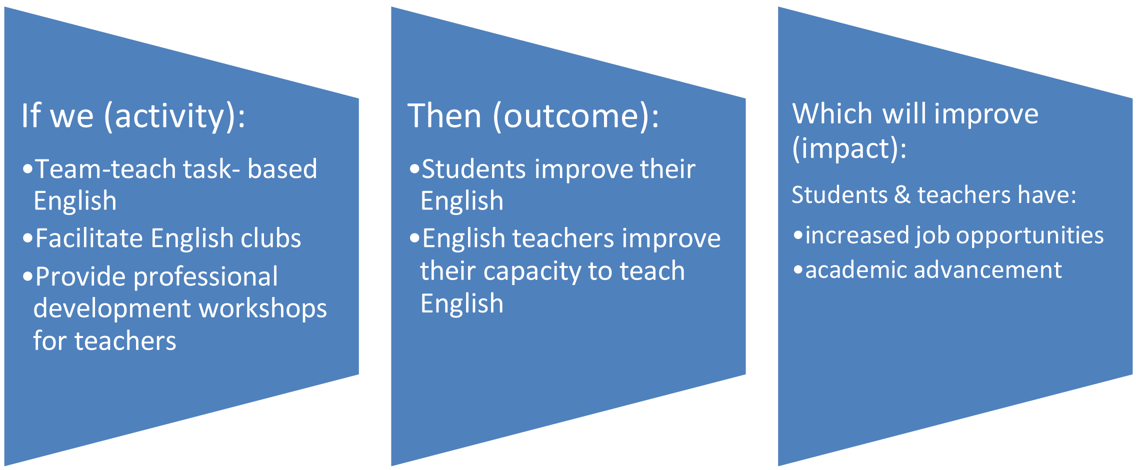
- What are the host country's national and community priorities and future vision?
- What information do we have (or could we get) about the current situation and from where? Begin determining baseline data sources here.
- What are the existing strengths and resources (individual, community, regional, national)?
- What factors have an influence on the existing situation?
- What are the barriers to women's, men's, or young peoples' participation in decision making and project activities? Whose labor time will be required?
- Is there an appropriate niche for the Peace Corps that complements the work of other organizations, that can be addressed using our philosophy of capacity building for sustainable development, and that meets the project criteria?
- What are key relationships between stakeholders to be aware of?
- Where are the natural opportunities for impact in one or more of the agency's CSPPs or initiatives?

Useful tools for organizing information include:

- SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis
- The Problem/Solution Tree
- Issue-Analysis Matrix
- Issue-Analysis Matrix Template

C.2.7 Identify the Theory of Change for the Project

Whether this is an existing or new project, identifying the theory of change model upon which the project is currently—or might be—based is a useful strategic exercise. A theory of change model is a visual and logical representation that depicts the relationships between the project and the improvements it is designed to bring about. The model formulates assumptions for how project activities will address targeted issues. It asks us to articulate the project's purpose: "if we do or support this activity, it will lead to these changes." Later, when the project framework is developed, the goals, objectives, and activities and indicators that reflect this theory of change will be articulated in much greater detail. For now, a theory of change model is simply a way to begin organizing some of what is learned in the analysis. For example:



Refer to the relevant sector guidance to identify and consider possible theories of change for the project areas in that sector. The sector guidance should also provide information on the evidence base that supports the validity of each theory of change. Experimenting with various theories of change may suggest areas in your project that need further investigation or analysis. Embracing and exploring the theory of change assumptions and logic model will guide the development of a sector- and post-specific project framework.

C.3 Analysis for the Revision of an Existing Project

The revision or review of an existing project attempts to improve the management and implementation of the project (a process evaluation), and it also ascertains the results of the project (a performance or outcomes evaluation). This section of the PT&E Guidance focuses on process evaluation. For more information on results-based evaluation, please see the MRE Toolkit.

C.3.1 Project Reviews

The APCD/PM manages the review and analysis process, with input from the DPT, CD, the Project Advisory Committee, and the training manager. Other staff, including specialists from Region, organizational partners, and Volunteers may also be invited to participate. A project review typically addresses the following questions:

Line of Inquiry	**Description**
Look back	• Are the goals and objectives of the project still appropriate? • Is the project meeting the goals and objectives defined in the framework? • What is working best? • What could be improved? • What are suggestions for revised activities and directions for the project? • Is the project too broadly defined? Is there a need for a more common, coherent vision that Volunteers and partners can target with more specific activities in support of greater, more sustainable change? Were Volunteers sufficiently trained for the breadth of project tasks and activities? • Is there a target beneficiary population (e.g., out-of-school youth, adolescent girls, fathers) and are they being reached? If not, how could the approach be improved to reach them? Has the project considered the differential impact (both intended and unintended) on men, women, boys, and girls? • What are project and training implementation successes and challenges? These are often well summarized in a post's Annual Status Reports (SRs). Include recommendations from any recent project plan review, formal or informal project review, inspector general (IG) evaluation, or impact study.
Look around	• Have the host country priorities or the project's context changed? • To what extent have the initial issue(s) being addressed changed at the national, community, and intermediate levels? This should involve gathering both quantitative and qualitative data to ensure that the project is having the desired effect on the beneficiaries.
Look forward	• What are the proposed changes in project direction? • Should the project be scaled up, shut down, or replicated elsewhere? • If recommendations have been made to move the project in a new direction, what are others doing related to that issue, what resources are available, and what factors might influence Peace Corps work.

The Peace Corps has a commonly used approach to project reviews, based on rapid appraisal methodologies. The purpose of a project review is to undertake a participatory process to identify project strengths, weaknesses, and opportunities to create a stronger project design, beginning with a strong framework. As much as possible, this analysis should be informed by good quantitative and qualitative data. A project review can be an opportunity to explore questions related to project outcomes and effectiveness and to resolve issues, including in-service training (IST) design, Project Advisory Committee (PAC) formation, partner/counterpart identification training and roles, coordination with other Peace Corps projects in country, Volunteer sequencing, and site selection and graduation strategies.

Peace Corps posts should schedule at least one formal or informal project review approximately 14 months prior to the end of the project's six-year phase. This review shapes the decision to close the project, develop a new project phase, or develop a new project with a similar purpose. In addition, staff members should schedule reviews if they believe that a project may require a significant revision prior to the completion of a given phase (see "Ask an Expert" below).

All project reviews include participation by post staff, agency partners, work partners, supervisors, beneficiaries, and Volunteers. Traditionally, Peace Corps project reviews have involved an external reviewer(s), such as another post's APCD, regional advisors (RAs), a locally hired consultant, and/or an OPATS or OGHH specialist. External reviewers add value to the process by bringing an outsider's perspective, experiences from other country programs, experience with the review process itself, and added manpower to accomplish the review. When an external reviewer is from PC/W, the review can also be an opportunity for staff at Peace Corps headquarters to better understand and support a specific project and to share promising practices with other posts.

However, a post may conduct a project review with only in-country staff if, for instance, changes to a project are anticipated to be minimal or resources for engaging an external reviewer are not available.

Additional information on planning and implementing project reviews is linked below. Please note that formal project reviews must be requested in advance, as outlined in Part 4: Management and Implementation, Section A.2.4.

The APCD/PM develops the scope of work for a project review with the DPT or CD. Resources for a project review may be provided through Region or by post's annual operating plan, so the dates, reviewer(s), and major activities should be planned well in advance of the review.

Select Resources

- Planning and Implementing Project Reviews
- Agenda for a Basic Stakeholder Workshop
- Tools and Methods for Project Reviews
- Example Education Survey Questions
- Example Interview Guides
- Framework Alignment Session Agenda
- Project Review SOW Template and Guidance
- Data Collection Methods (one page)
- Comparison of Information Gathering Methods
- Methodology for Writing up a Finding
- The MRE Toolkit
- Gender Analysis Questions for Project Design (Annex A of the Peace Corps Gender Guidance, forthcoming)
- Gender Analysis Questions and Strategies by Sector (Annex B of the Peace Corps Gender Guidance, forthcoming)

Ask an Expert: Does This Project Require a Significant Revision?

If you are unsure whether or not a project needs a significant revision, please consider the following questions, referring to COS interviews and the Annual Volunteer Survey for evidence:

- Are Volunteers spending significant time in activities outside of their primary assignment?
- Do Volunteers feel they are involved in meaningful work that:

  - Adds unique value to local initiatives by capitalizing on their skills and perspectives as outsiders?
  - Is conducted with support from their work partners, local and regional decision makers, and the community as a whole?
  - Strikes a balance between Volunteers having a real job they are trained and qualified to do and the flexibility necessary for participatory community development?
  - Is culturally appropriate and facilitates structural changes, so that continuation of the work is not dependent on the prolonged presence of Volunteers?
- Are Volunteers successful in all project goal areas? Do the activities in the project framework generally describe most of the work for the majority of this project's Volunteers?
- Do you intend to significantly change the project location or direction, fold two projects together, or create a new project from an old one?

These questions may lead you to conclude that your project requires a review.

C.4 New Projects: The Concept Paper

A concept paper is required for new projects. This may include a project that moves into a new sector or a significantly new direction as the result of a redesign. The concept paper should be submitted to the ChiPT at least 18 months prior to the proposed start date. Review of the concept paper by PC/W is important to confirm that resources will be available to support the project and that Volunteers of the types and numbers likely to be requested can be recruited.

Here are the required elements of a two- to four-page concept paper:

Summary: Overall vision for the project and brief rationale for why the project is important; include the proposed duration for the project.

Part 1: Background

- **1.a Request From the Host Country**: explains how the host government articulates the need for this project to the Peace Corps, how it was involved in the concept development, and the person responsible for developing the concept paper.
- **1.b Peace Corps Capacity With the Issue**: offers a brief description of the Peace Corps' historical and recent experience with the issue, both in-country and relevant regional/worldwide.
- **1.c Situation Analysis:** includes brief statistical data that directly relates to the issue and a concise analysis that makes a case for the project. This should include national- and site-level baseline data. This section also mentions noteworthy government resources, strategies, or policies that relate to the issue, current activities and organizations addressing the issue, and the host government's expressed interest in collaborating with the Peace Corps.

Part 2: Project Role

- **2.a Overview:** addresses how the project fits with the host country's national and local priorities.
- **2.b The Peace Corps' Role:** is a paragraph that concisely identifies the unique role that Peace Corps Volunteers can play in addressing the issue.
- **2.c DRAFT Project Framework** (half to one page): includes the project purpose, goals, objectives, and a brief description of activities, as outlined in Section D. While a complete set of indicators is not required at this point, include any relevant Standard Indicators (SIs) that align with the objectives and proposed baseline data from the situation analysis. The project toolkits for each sector provide useful preliminary resources for developing this draft framework.

Part 3: Implementation Plan

- **3.a Project Implementation Partners:** identifies the organizations and/or institutions with which Volunteers will most likely work.
- **3.b Site Selection & Assignment:** outlines in general terms where the project will be implemented initially and why.
- **3.c Numbers and Skills of Volunteers:** estimates how many Volunteers will be invited and identifies what experience and skills they will need to implement the project (for an initial conversation with VRS on the feasibility of recruitment).
- **3.d Staffing and Resource Needs:** considers budget implications as well as the additional staffing and resources beyond current levels that post will need to implement the project.
- **3.e Proposed Timeline for Implementation:** gives the proposed benchmark dates, at a minimum, for: (a) the arrival of any PC Response Volunteers; (b) the arrival of any proposed third-year extension Volunteers; (c) the arrival of the first two-year training group; and (d) the date for submission of a completed draft project plan.

D. Step 2: Develop or Revise the Project Approach

After analyzing the existing situation, the next step is to define the appropriate, specific role for the Peace Corps in supporting host country priorities and communities in the chosen focus area. The appropriate role for the Peace Corps is expressed in the project's purpose, goals, and objectives—or the project framework—which is the heart of the project plan. The project framework takes into account the project criteria, Peace Corps Cross-Sector Programming Priorities (CSPPs), initiatives, gender analysis, the Peace Corps capacity-building framework, promotion of behavior change, and sustainability. It does all of this while imbedding an outcomes-driven MRE system.

Normally, a draft project framework is revised multiple times prior to finalization. The PAC, PC/W staff, and others are invited to review and provide input to the framework.

D.1. Developing a Framework for a New Project

The development of a framework for a new project is an iterative process that begins with the development of the concept paper and often continues through the first year or two of project implementation. Incorporating input from the PAC, PC/W specialists, and others will strengthen the framework. The APCD/PM manages the input process so that a project is defined sufficiently, clearly, and appropriately focused. The DPT should be closely involved as well, providing on-going leadership, feedback, and support for the process.

Throughout the process of developing the project framework, the APCD/PM should keep training requirements in mind and modify the framework as needed to be sure that staff and resources will be sufficient to train and support Volunteers to complete their assignments. The APCD/PM can design a project framework with training in mind by: (a) working closely with the training manager; (b) seeking input from other Peace Corps posts with experience implementing and training in proposed activity areas, collaborating with the sector or training specialists at PC/W; and (c) referring to the terminal learning objectives (TLOs) for all Volunteers and for all sectors. These terminal learning objectives are part of the core and sector-specific training packages under development and in use at posts. Please refer to the Programming, Training, and Evaluation Resources page on the Peace Corps intranet for a complete list.

D.2 Revising a Framework for an Existing Project

If a significant change in the project direction is anticipated, the APCD/PM may decide to lead the team in a process similar to designing a framework for a new project. If only minor changes are expected, particularly in the middle of a project implementation phase, then it is advisable to keep as much of the existing project framework intact as possible. This avoids confusion among Volunteers and partners and simplifies the articulation of project accomplishments and results over the implementation period. For example, rather than adding a new objective, a new indicator may be added to track new developments in the project.

Projects that are too broadly defined require more training to adequately prepare Volunteers. Over time, budget and expertise limit necessary training opportunities. This may result in ill-prepared Volunteers, misled expectations of Volunteers and staff, and lower project impact. A more focused project can avoid this pitfall. Projects that are defined too narrowly, however, may not provide enough activities for Volunteers to maintain a high level of productivity.

The following questions may be helpful for discussion of framework revisions for an existing project:

- Should any project objectives be eliminated because Volunteers have had little success achieving those objectives, because those objectives are no longer a priority for the host country, because post resources are insufficient to provide adequate training for the activity, or because the successes of Volunteers and others have been so great that Volunteer efforts are no longer needed in that area?
- Should project goals and objectives be modified to encompass additional Volunteer activities that contribute to the project purpose? Sometimes Volunteers find that the activities for which they were trained are insufficient to maintain a high level of productivity and, instead, they experience success with CSPPs or activities related to the project goals and objectives but for which they received minimal or no training.
- As projects mature, opportunities for engagement at the institutional level increase, as does the need to strengthen the sustainability of Volunteer work. Should goals and objectives be modified to reflect activities aimed at promoting sustainability and gender integration?

It may be best to make framework changes at the start of the fiscal year to avoid complicating the input and analysis of the Volunteer Reporting Tool (VRT) information.

D.3 The Peace Corps Niche

The appropriate role for Volunteers in a sector (Peace Corps niche) is to build on what others are doing while filling an identified gap. A sound definition of the Peace Corps niche takes into consideration host country national priorities, local needs, the coordination of local and other resources that are being applied to meet those needs, and available Peace Corps Volunteers and Peace Corps resources. As programmers define the appropriate role for Volunteers, expectations for the types of Volunteers who can be recruited and the level of technical training they will need should be discussed with recruitment staff in PC/W and training staff at post.

National priorities and resources:

Peace Corps projects contribute to priority efforts supported by the national government, other international donors, and NGOs.

Community priorities and assets:

Peace Corps projects support community priorities, leveraging community assets available to contribute to the project.

Volunteer knowledge, skills, and attitudes:

The added value of Volunteers takes into consideration their role as outsiders working and living within a local community, the knowledge, skills, and attitudes they bring to Peace Corps, and the core and sector competencies gained through Volunteer training. These often include capacity-building and facilitation skills, including cross-cultural and gender awareness. Volunteers are often also well-positioned to work with young people. Project design must take into account the number of Volunteers with a particular skill set that can be typically recruited.

D.4 The Project Framework

A project framework is the heart of a project plan and works in tandem with monitoring, reporting, and evaluation design. Project activities and audiences are defined as are the desired outcomes. Statements flow from one to the other logically, with a linkage between each level. The project framework reflects a project's theory of change, which clarifies activities and ways of measuring progress toward achieving the goals and objectives of the project plan. Indicators of change imply contributions toward project objectives, which affect achievement of project goals. Goals, taken together, contribute to the project purpose. The project framework takes into account the project criteria, Peace Corps CSPPs or initiatives, gender analysis, the Peace Corp's capacity-building approach, promotion of behavior change, and sustainability. Project toolkits are available for each sector, providing templates and examples for each component of the framework. There is also CSPP guidance for examples of how to incorporate a chosen CSPP into a project framework.

The Project Framework

The project framework that the Peace Corps uses includes five levels, which are linked: purpose, goals, objectives, activity statements, and indicators. Ultimately, a strong project framework is the foundation for effective training and quality Volunteer work. Information collected toward indicators of change are reported, compiled, and summarized through the Volunteer Reporting Tool (VRT). Volunteers report their activities, progress, and outcomes on Volunteer Report Forms (VRFs) periodically during their service. Here is an outline of each of the components of the project framework in greater detail.

D.4.1 Project Purpose

The statement of project purpose describes the main target group and the broad public benefit that will result from the project (a long-term outcome, or impact). The purpose should reflect the visioning process that has gone on with stakeholders. Purpose statements are long-term. See the example below or review the project framework toolkits for examples from each sector.

> *Example purpose: Zomban students and teachers will gain access to enriching personal contacts, increased job opportunities, and academic advancement through English.*

D.4.2 Project Goals

Project goal statements articulate intermediate or longer-term outcomes that need to occur to achieve the project's purpose. Goals reflect a change in condition for communities, such as more jobs available, better access to healthy foods, cleaner water sources for drinking, or a lower incidence rate of malaria. Achievement of goals can usually be measured at a community or population level as well, rather than at the Volunteer's more local level, where they may be reaching only a segment of the overall community.

> *Example goal*: ***Student Achievement—*** *Zomba high school students will think critically and use English more effectively.*

Project goals can be expected to be reasonably achieved within the project phase's implementation period. There should usually be two to four project goals to support the project purpose.

Project Goal Baselines and Targets

Impact Evaluation of Peace Corps Projects: The Peace Corps has a duty and desire to know the impact it is having on groups, communities, and populations it has been invited to serve. Impact evaluation requires that several criteria are met:

- **Assesses change in condition:** for the Peace Corps, impact must be measured at the goal level, which measures changes in condition.
- **Change can be measured**: baseline measurements at the goal level are required, using methods outlined in the MRE Toolkit.
- **Peace Corps contribution to change is evident:** to assess contribution requires a comparison of changes in condition for groups and communities that the Peace Corps has served to similar entities the Peace Corps has not served, referred to as "counterfactuals," or comparison groups.

Posts are expected to contribute to the Peace Corps' knowledge of its impact on communities served. To meet this need, posts should define baseline conditions for project goals prior to the initiation of a project and one or more times during and at the end of the project using measures that can be replicated for communities not being served by the Peace Corps during these same time periods. Additional information about appropriately conducting impact evaluations can be found in the MRE Toolkit.

D.4.3 Project Objectives

Project objectives articulate the most significant, attributable outcome or outcomes that will result from Volunteer and partner activities, and they will contribute to achievement of project goals. Project objectives quantify the short-term outcomes expected from the activity. Objectives should be SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound). The basic elements of an objective are a timeframe, a target audience, and a desired outcome that reflects what the Volunteer and partner activities can achieve *and* what Volunteers can realistically measure during their service. Objective statements answer the question: "What outcomes are expected to occur that are directly attributable to Volunteer/partner activities?" Each project goal should have at least one objective, but not more than five.

> *Example objective:* ***Students' Improved English Performance in the Classroom Setting—*** *by September 2018, 6000 high school students will improve their English language and/or critical thinking skills through formal activities in the classroom setting.*

D.4.4 Indicators

Indicators of change are used to gauge project performance. They are measures that indicate positive change toward an objective, goal, and purpose. Indicators measure the extent to which knowledge, skills, attitudes, behaviors, systems, and conditions have changed.

Beginning in May 2011, the Peace Corps started rolling out Standard Sector Indicators (SIs) for each of its six sectors. Projects are required to report on relevant SIs. When necessary, posts can also establish additional indicators that are useful for monitoring and evaluating the project in their context. Post-Developed Indicators (PDIs) are indicators that posts define as critical to their specific objectives and goals and that are not found through an examination of SIs. PDIs should be used only when needed.

Thus there are two types of indicators in project frameworks: Standard Sector Indicators (SI) and Post-Developed Indicators (PDI).

> *Example based on the objective listed above:* ***Students' Improved English Performance in the Classroom Setting—*** *by September 2018, 6000 high school students will improve their English language and/or critical- thinking skills through formal activities in the classroom setting.*

Example indicators:

SI/PDI	**Output Indicators:**
PDI	**1.1.a:** Number of students taught by Volunteers and their counterparts.
SI/PDI	**Outcome Indicators:**
SI	**1.1.b: Students: English Proficiency** – Number of students, out of the total number of students the Volunteer/partner worked with, who demonstrated improved English proficiency based on class content through formal or informal assessment. (ED-004-C)
SI	**1.1.c: Students: English Literacy**—Number of students, out of the total number of students the Volunteer/partner worked with, who demonstrated improved performance in reading or written composition in English for academic or professional purposes based on class content through formal or informal assessment. (ED-005-C)

SI	**1.1.d: Students: Critical Thinking** – Number of students, out of the total number of students the Volunteer/partner worked with, who demonstrated at least one new or improved critical-thinking skill. (ED-034-C)

For current information on setting targets for indicators, see the MRE Toolkit.

D.4.5 Activity Statement

The activity statements explains the means by which an objective will be achieved and expressed in the timeframe of what Volunteers and their partners will accomplish each year of the project. In the project plan, the activity statement immediately follows the objective.

Example activity statement: Each year, 40 Volunteers and their counterparts will reach 2,000[1] *high school students by teaching (team-teaching whenever possible) lessons that incorporate different learning styles, critical thinking, and task-based activities designed to improve students' English language skills.*

E. Step 3: Define or Revise the Project Implementation Plan (Sites, Partners, Volunteers, Tasks, Training, and Resources)

A project implementation plan answers these questions:

- Where will the project be implemented? At what *sites*?
- Who will serve as supervisors and work *partners* for the Volunteers?
- How many *Volunteers* are needed and what characteristics, experience, knowledge, skills, and interests should they have?
- What major *tasks* will Volunteers and partners undertake to meet project objectives?
- What are the significant *training* considerations that have staffing and resource implications?
- What special *resources* might the project need to achieve project goals?

The PAC members and host country agency partners are critical participants in making key project decisions. Peace Corps Washington must be involved in discussions where recruitment or post budgets will be affected.

E.1 Site Selection Strategy

A site strategy defines a project's geographic focus, clustering strategy, use of rural versus urban sites, site selection criteria, and length of project assistance at each site. As you develop your strategy, consider project goals and objectives, the skills of Volunteers, safety and security, partner agency capacity for appropriate Volunteer support, participation of other development agencies, sustainability and replicability of efforts, and availability and interest of partner agencies to work with Volunteers. Refer also to any specific regional guidance related to site development and selection.

[1] Each Volunteer will have 50 students per class; 40 Volunteers x 50 students = 2,000 students.

E.1.1 Geographic Focus for a Project

The following factors influence the regional focus for a project:

The size of the country: If the country is small and has relatively easy access to all regions, it might be possible for the project to be implemented throughout the country. If the country is large, with widely dispersed populations, it may make more sense to select one or a few regions in which to focus the project. Then, if the project is successful, it could be replicated in other regions later. Considerations that impact the strategy for determining a project's geographic focus include:

- The geographical area(s) for the project that would have the greatest impact.
- Areas with the greatest need/greatest risk factors for project priority activities.
- Areas whose priorities are not being met through other support.
- Demonstrated local enthusiasm for—and commitment to—project issues.
- Commitment from regional organizations; other conditions or opportunities that will likely contribute to project success.

Safety concerns and restrictions in the country: Some countries have regions or districts that post has determined are unsafe to place Volunteers.

Volunteer support: It is easier to monitor and support new projects in a smaller area than a larger area. Being able to visit more Volunteers in a smaller area enables Peace Corps staff to spend less time traveling and more time engaged in other work.

E.1.2 Clustering Strategy

APCD/PMs may choose to place Volunteers from the same project or different projects intentionally in clusters so that:

- Volunteers can collaborate with each other across projects (e.g., Agriculture, CED, and Environment).
- More highly skilled Volunteers are placed near other Volunteers to provide technical support.
- The project can facilitate communication between partners from different communities, enabling them to learn from each other and to see their issues and efforts in a broader context.
- An APCD/PM from one sector can visit more Volunteers in the project with less travel. This approach also facilitates the site identification process.
- Volunteers can support each other's safety and security.

In some cases, , APCD/PMs may choose not to place Volunteers too close to each other or may caution Volunteers against too much collaboration with each other, recognizing that clustering may be a detriment to strong relationships between Volunteers and work partners or counterparts, and even to the sustainability of projects.

E.1.3 Rural Versus Urban Sites

Here are some considerations as you determine appropriate locations for placements:

Pros of rural sites:

- Rural areas offer strong opportunities for Volunteer integration and development opportunities benefiting the lowest income groups.

- Other development organizations, even when their mission includes rural areas, do not have the resources to place staff in rural sites.
- Rural placements provide jobs that are appropriate for generalists, who make up the greatest pool of Peace Corps Volunteers.
- Rural areas often have lower crime rates than urban areas, decreasing Volunteer exposure to risk.
- These areas have the largest number of people needing assistance.

Pros of urban sites:

- Urban sites usually have better infrastructure.
- It can be easier to identify Volunteer work assignments with more established partner organizations or institutions.
- It is often easier to meet post criteria for housing, communications, and safety for Volunteer assignment.
- Some medically accommodated Volunteers must live near facilities that can be found only in urban sites.

Keep in mind that this is not always an "either/or" choice. Many projects have a strategy for placement of a smaller number of Volunteers in urban sites that complement larger numbers in rural locations. For example, staff may place a few more highly skilled Volunteers in urban centers to work with a specific organization or department (e.g., Junior Achievement or the ministry of education's curriculum department) with the aim of improving the organization's support for outreach work with low-income rural and urban populations and organizations. Such higher-level assignments are usually most appropriate for more experienced Volunteers or third-year Volunteers.

Many smaller, remote sites have limited absorption capacity for external assistance, do not house agency partners, or lack the social capital or institutional presence to appropriately support Volunteers.

For example, a single project may have 25 volunteers, five of whom have more specialized experience. Volunteers may be placed so that a specialized Volunteer is at a regional health office and others are at village health posts supported by that regional health office. This type of strategy permits sharing of expertise and uses the different skills of Volunteers in an appropriate way. In addition, this type of strategy can strengthen links between district and regional offices. If you opt for this strategy, ensure that Volunteers and partners share a strong, clear sense of unified purpose, as articulated in their project framework. It is useful for Volunteers to see their work as contributing to a greater effort, even when they work in very different types of sites.

E.1.4 Site Selection Criteria

Using regional guidance as a starting point, each post and APCD/PM should establish and document criteria for selecting communities, partner agencies, and housing for Volunteers. Below are ideas that can help. In addition to Peace Corps post health and safety criteria, project criteria should be established for determining which sites to explore and select for Volunteer placement. Such criteria should take into account:

- **Organizations with a strong interest in hosting a Volunteer.** The APCD/PM should look for groups or organizations whose leaders and members are interested in change and will benefit from a Volunteer.
- **Demonstrated needs that are consistent with project goals and objectives,** and can be met with the skills that the Peace Corps can recruit and train. The better an organization understands the role of

the Peace Corps Volunteer and can articulate how that role is appropriate to develop capacity in their organization, the more likely a Volunteer is to be effective in his or her work.

- **A Volunteer should build capacity, not fill a job vacancy.** In their search for assistance, many host country agencies and organizations focus on job identification or placement to fulfill their human resource needs as opposed to appropriate work assignments to build capacity and promote sustainable systems change. The APCD/PM aims for the latter.
- **The potential of a partner organization to enhance the sector.** Peace Corps projects ideally facilitate the development of institutional/sector knowledge and constructive change. The organizations that Volunteers work with should be selected for their potential to enhance the development of the entire institution/sector. This does not mean only the best or already most well-organized, but also refers to those with the potential to make a difference and to be a peer role model of change for other organizations and communities grappling with the same institutional/sector issues.
- **The identification of a supervisor and at least one enthusiastic work partner or community contact who can support the Volunteer.** Enthusiastic and dedicated work partners are often the most important factor in determining both Volunteer satisfaction and success. When appropriate for the project, supervisors can play an important role in guiding Volunteer work and ensuring that adequate organizational resources and support are available. Supervisors can be located at the site where the Volunteer lives or at a remote site. See Section E.2, Host Country Partners, for further descriptions of these roles.
- **Community dynamics.** Communities with strong, visionary leaders and with residents that are welcoming and open to trying new approaches make stronger potential sites for Volunteers.
- **Health and safety criteria.** Safety and security are a high priority for the Peace Corps. Section 270 of the *Peace Corps Manual* governs site development, including the establishment of safety and security criteria for prospective Volunteer and trainee sites. Site and housing health and safety criteria are established by each post and may include parameters such as: the absence of frequent civil unrest or of serious environmental hazards; the frequency of public transport; access to emergency transport, services (clinics, markets, police), and reliable communications; the availability of potable water; the security of housing; and proximity of neighbors.
- **Housing availability.** Host communities must be able to identify or provide housing that meets criteria established at post.

For more information on site selection criteria, consult region-specific guidance.

E.1.5 Length of Project Assistance at Each Site and Roles of Sequential Volunteers

A site strategy should define the number of sequential Volunteers to be placed in each site (usually two or three), and the roles that sequential Volunteers will play. Consider the factors below.

The second and third Volunteers at a partner agency or in a community can help a community deepen and broaden skills and knowledge. The length of time should be sufficient to achieve the project goals and the corresponding needs of the community. Leaving a site too soon may negatively impact opportunities for sustainability. Staying too long may create dependency. For example, some projects routinely place three generations of Volunteers in a site and then move on to different sites (in the next phase of implementation). The first Volunteer concentrates on participatory planning and stakeholder buy-in, the second Volunteer concentrates on implementation, and the third Volunteer concentrates on phasing out Peace Corps involvement to support sustainability and capacity building. Note that training staff should be aware of the strategy determined.

Assigning Volunteers with different skill sets supports a partner agency's development in different areas. For example, a business Volunteer skilled in accounting might help a youth-serving organization improve their financial management systems. A second business Volunteer might help them develop an entrepreneurial education program and business plan contest.

There are other factors that influence the length of time that the Peace Corps remains at a site and the number of Volunteers placed sequentially. These include:

- The amount of support provided by the partner agency or community.
- The amount and kind of interest and involvement of the supervisor and counterpart or work partner.
- The involvement of other development organizations.
- Safety and security.
- Volunteer early terminations.

E.2 Host Country Partners

Partnerships with host country organizations are critical to the success of projects and Volunteer assignments. They help Volunteers integrate, contribute to the sustainability of Volunteer work, and support community participation in activities Volunteers engage in with partners. The Peace Corps capacity-building approach to development requires that Volunteers work closely with work partners or counterparts to share skills, knowledge, and expertise.

In the planning process, it is important to determine who will be the project's key regional or national government agency or ministry partners, and who will be the Volunteer's partners. In addition, projects sometimes develop partnership relationships with other development agencies or NGOs, such as Grassroots Soccer or the United Nations Children's Fund (UNICEF), which are sometimes developed in alignment with agreements negotiated by PC/W.

For every site, a Volunteer will usually work with one or more sponsoring local agency partners. The local agency partners could be a government agency, farmers' association, parent-teacher association, school, cooperative, chamber of commerce, or local or regional NGO.

The following describes the critical roles and relationships of key individuals who are typically identified for each Volunteer:

Work partners (or counterparts): the individuals who work with Volunteers and jointly learn through experience how to do something new within the local cultural context and with enough competence and confidence to transfer their learning to others. Given that: a) many work partners are probably engaged in a variety of activities, some of which may not directly relate to the Volunteer's assignment; b) turnover of personnel in organizations is a reality; and c) the relocation of community leaders and members seeking personal opportunities and fulfilling family obligations is also a reality, posts have found that *Volunteers are usually more productive and effective when they are assigned to (or encouraged to seek) more than one work partner.* This could be true for a youth project where both an adult work partner and youth partner are identified. It may also be true if one or more partners are engaged on a voluntary basis on project activities during their discretionary time. This approach ensures full-time work for the Volunteer and will build social capital among coordinating partners.

Community hosts: In some cases—for example, when training teachers in a school—Volunteers are given the opportunity to select their own work partner or counterpart, rather than having one pre-selected. This approach empowers the Volunteer to establish work partner relationships. In this case, the selection of an enthusiastic and well-respected community host or a person whose role is simply to accompany the Volunteer during his or her community-entry process, introducing Volunteers to key community members and assisting with their community integration is particularly important.

Supervisor: Most, but not all, Peace Corps projects identify a person within the local agency partner organization in charge of a particular department or unit who is responsible for the Volunteer assigned there. Typically, this person can authorize organizational resources for Volunteer use, but may not work with the Volunteer on a daily basis. Indeed, in some cases, supervisors are not located in the same community as a Volunteer. On the other hand, sometimes the supervisor also fills the role of a work partner for the Volunteer.

The term "partner" is used in this guidance to signify all partners, including work partners, supervisors, and representatives of organizations with which a project has a partner relationship.

During the site development process, it is critical to identify a Volunteer's partners and to set expectations on all sides for the role of partners and for flexibility in Volunteer–partner relationships. If no local agency, work partner, community host, or supervisor can be identified, a project site is not ideal for a Volunteer.

E.3 Volunteers to Recruit

The Volunteer Recruitment and Selection (VRS) office is responsible for recruiting Volunteers who best match the needs of a project. Your region—particularly your programming and training unit (PTU)—and VRS can help you to formulate your strategy for requesting an appropriate balance of Volunteer technical skills and attributes that meet the needs of your project and that can be recruited from the Volunteer applicant pool.

The PTU and VRS welcome dialogue from posts regarding the types of trainees to request, the feasibility of getting trainees with particular skills, strengths and weaknesses of Volunteers from the last training class, and the best options for scheduling pre-service training (PST), as availability of certain skill sets and competition with other posts vary throughout the year. Each country has a placement officer that invites all of the Volunteers to your post. It is important that you have an ongoing dialogue with the placement officer in order to keep them well-informed on the needs of your post.

Since recruitment and placement is a rapidly changing area of Peace Corps business, refer to the VRS placement intranet landing page for the latest resources, including the following:

- The *Trainee Request Handbook* (*TRH*) is updated annually to assist Peace Corps posts in determining the types of trainees to request for their programs. There should be copies of the *TRH* at post.
- Two important documents produced by posts as part of the process of requesting trainees are the Job Specific Requisition (JSR) and the Volunteer assignment description (VAD). The JSR is submitted by posts to request and describe the types of trainees needed to fulfill project plans. Submission of the JSR by the established deadlines gives post the maximum advantage in receiving a full training class. The VAD provides a description of the Volunteers' project work and primary activities.

E.3.1 Balancing

Historically, 85 percent of the agency's Volunteers have been recent college graduates with little or no professional experience. These are the types of applicants who consistently apply to be Peace Corps Volunteers. These recent college graduates are well-educated, highly motivated, and capable of becoming effective agents of change with the right training and support. With few exceptions, posts must plan projects and Volunteer training with this type of candidate in mind.

Some Peace Corps applicants have specialized training or experience in a particular professional or technical area. The project plan and JSR will identify the strategy for recruitment and placement of any required specialists, including the use of Peace Corps Response Volunteers, and how their sites and assignments will differ from those of other applicants.

Peace Corps has found that Volunteers of all backgrounds and experience bring strong leadership and community involvement experience.

E.3.2 Master's International, Peace Corps Response, and More Experienced Volunteers

As you develop your site placement strategy, consider which placements might be particularly appropriate for couples, Master's International Volunteers, Peace Corps Response Volunteers, and other more experienced Volunteers.

Master's International (MI)

Master's International Volunteers are enrolled in participating master's degree programs, usually spending a year on campus taking classes before going abroad to serve as Peace Corps Volunteers. While Master's International Volunteers are Volunteers first and can serve in any assignment for which they are qualified, placements for these Volunteers may be a particularly good match when they involve surveys, assessments, or evaluations related to a particular sector.

Peace Corps Response

Peace Corps Response Volunteers (PCRVs) provide posts the opportunity to address host country development needs with more highly skilled, short-term volunteers. PCRVs can be RPCVs or other experienced professionals who are available for assignments ranging from three months to one year. All PCRVS have the necessary professional skills, adaptability, and cross-cultural skills to begin working with local partner organizations after an orientation, but without additional training. PCRVs support Peace Corps projects in several important ways, including:

1. Providing technical expertise to existing projects in one or more of the agency sectors (Agriculture, Community Economic Development, Education, Environment, Health, and Youth Development).
2. Assisting regions and posts with the implementation of CSPPs (Support for People with Disabilities, Gender Equality and Women's Empowerment, HIV/AIDS, Technology for Development, Volunteerism, and Youth as Resources).
3. Implementing programmatic and organizational partnerships for the agency.
4. Facilitating new country entries or re-entries for the agency.
5. Assisting with responding to humanitarian crises (post-conflict and post-disaster reconstruction).

PCRV position descriptions are crafted by post, in conjunction with local partner organizations. The descriptions include specific deliverables to be completed during service as well as the precise candidate qualifications necessary for the assignment. If advanced degrees, specific years of experience in a particular field, or language requirements are necessary for Volunteers to successfully serve in these assignments, they can be requested. PCR recruiters will identify potential candidates to meet these specific needs.

After the finalization of the position description, PCR recruitment and placement specialists require about three months to identify, secure all of the necessary clearances, and send PCRVs to post. If post is requesting that a group of five or more Volunteers arrive at the same time, a lead time of six months is recommended.

A strong, robust PCR program increases post's host country development impact by deepening and enhancing post programming. It is recommended that posts take a strategic long-term approach to developing a PCR program to ensure maximum integration into existing programming and to sustain positive impact. For more information, see Peace Corps Response on the intranet.

E.3.3 Types and Numbers of Volunteers (the JSR and VAD)

Total Number of Volunteers

Historically, Peace Corps projects each addressed one sector with 30 to 35 Volunteers per APCD/PM and 15 to 20 new trainees arriving per year. However, new models have emerged which support the agency's strategy to focus on key sectors and train for excellence. Many posts have targeted projects with more than 30 to 35 Volunteers, and staffing patterns to match those increased numbers.

Area Assignments (AAs)

Currently, the skills and sector interests of Peace Corps applicants are categorized by assignment areas (AAs), described in the *Trainee Request Handbook*.

There is a section for each AA in the *Trainee Request Handbook* that includes not only educational and professional requirements, but also appropriate assignments, guidelines for requesting the AA, and possible substitutions. These sections also include observations by placement officers regarding the personal interests and expectations typically found in prospective Volunteers in each AA.

Numbers of Volunteers with Different Skill Sets

Although VRS makes every effort possible to recruit and place trainees as requested by posts, trainees with some skills are requested in greater numbers than VRS can reliably meet. In such cases, VRS/Placement and posts discuss options to best meet programming needs while ensuring full training classes.

Timing can also be a major factor in receiving the number of trainees requested, especially if a post is competing with others requesting the same types of trainees. While many generalist applicants graduate in May and June, this is also a time that many posts recruit applicants and the most challenging time of year for meeting post trainee needs. In addition, applicants now have greater choice in requesting a country and type of assignment.

In addition to competition for skills and the timing of a request, several other factors influence the number of trainees a post is likely to receive (also covered in the *TRH*). These include:

- JSR information that is now available to the public on the Peace Corps website.
- Clarity of information in the Volunteer assignment description (VAD).
- Accessibility and descriptiveness of information on the post's website.
- Post's ability to accept alternative skills and qualifications.
- Late changes in trainee requests or staging date.
- Post's medical restrictions and ability to make reasonable accommodations.
- Language requirements.
- Applicants' perceptions of a country or region.

The JSR

The Job Specific Requisition (JSR) is an electronic form that informs Volunteer Recruitment and Selection (VRS) as to the number, skills, and departure dates of trainees to recruit. See the VAD and JSR Submission Timetable for JSR submission due dates. Ideally, a JSR is due 12 to 15 months prior to the arrival of a training class. The JSR is reviewed and approved by the regional programming and training specialist (PTS) prior to submission to VRS. VRS/Placement staff may seek clarification from post if additional dialogue is needed to ensure that VRS/Recruitment can recruit trainees as requested.

VRS encourages posts to include in the JSR information not only about the requirements of the trainees being requested, but also outline the main focus of the project and provide any other details that might pertain to applicants' expectations. For example, some people in the business field might like to teach, while others have no interest in teaching. A brief note, such as "project focuses on teaching in business education centers," can help recruiters and placement officers make the most appropriate match of an applicant to a request. Trainees are recruited and placed based on JSR information (see the JSR Guidance on the Placement Office intranet landing page).

Aim to specify skills in terms such as "experience with forestry preferred," as opposed to "six months of classroom teaching required," so as not to over-restrict the applicant pool. Note that in APCD/PM surveys over many years, APCDs have consistently ranked the following attributes—all of which are integral components of the VRS application process—as more important than technical skills for determining Volunteer success:

- Cultural adaptability (open-mindedness, flexibility, awareness of the needs of others)
- Emotional preparedness (independence, professionalism, interpersonal communication abilities, ability to develop support systems)
- Motivation, commitment, and enthusiasm for a project

Key elements of the JSR:

- Required and desired Skills
- Language requirements (it is possible to request Spanish, French, and Romance language skills. In regard to identifying the language level desired in the JSR, Spanish language skills are denoted as S1 = basic; French as F1; and Romance language as RL. Applicants cannot be recruited for other skill levels.)
- Descriptions of the types of work Volunteers will do
- Additional considerations and preferences on background and experience
- Physical or technical requirements of the Volunteers during their service, including MRE expectations
- Placement options and skill combination considerations for married couples
- Note that posts cannot discriminate based on any protected classifications, but may specify work conditions or safety considerations that affect the appropriateness of applicant placement. Please work with VRS/Placement to identify accurate AAs to meet programming needs.

Also note that almost all JSR fields are now viewable by the general public via the Peace Corps website. With this in mind, the JSRs should be as descriptive and engaging as possible. Before completing a JSR, posts should review the current Volunteer openings via the Volunteer Openings page on the Peace Corps website to get a better understanding of how the information listed in the actual JSR fields will be displayed and shared with the public. Posts should be thoughtful, accurate, and purposeful when completing the public fields of a JSR, as the words used are key advertising for each of the posts' assignments. JSRs must be balanced and complete, covering all factors which the post considers essential. The public, including host country citizens, and potential applicants, will use the JSR as a primary source to decide whether to apply for assignment to specific posts and programs. Please work with your CDO and the Office of Communications as appropriate to develop JSRs that are in line with Peace Corps style preferences.

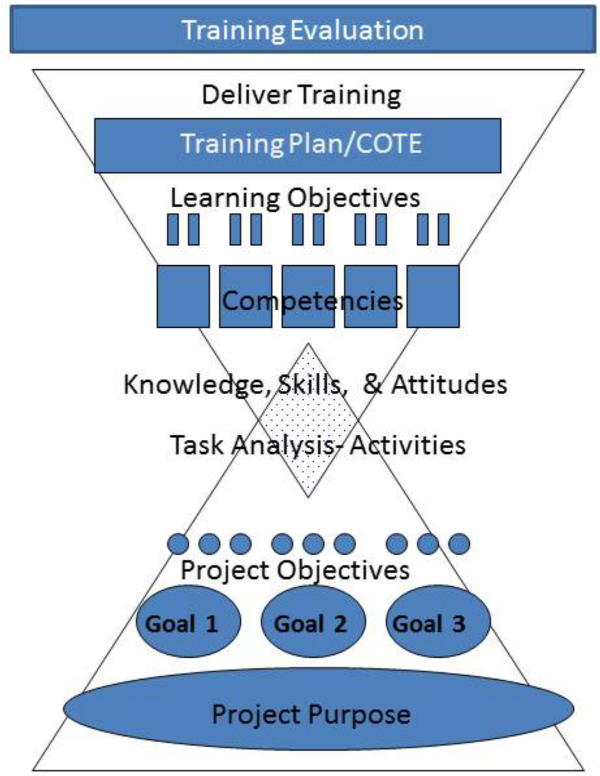
The Volunteer Assignment Description (VAD)

The VAD is due to PC/W four quarters prior to trainee arrival. It is included in the invitation packet to an applicant and influences not only an applicant's decision to accept an assignment, but is likely to be the first significant document that shapes the expectations of prospective Volunteers about the project work.

Perhaps the most important point to keep in mind is that the VAD is the post's way of introducing itself to its next prospective Volunteers. Therefore, information needs to be presented in a way that is accurate and well-balanced, and that leaves prospective Volunteers wanting to be part of the Peace Corps mission.

Since most recruitment for your training class is already completed by the time VRS receives the VADs, they are not used by the Office of Volunteer Recruitment for recruiting for your assignments. However, they are used by the Office of Placement to set realistic expectations for applicants. In the project plan, a well-written "summary of what the Volunteers will do" can often be copied and pasted directly into the VAD.

E.4 The Task Analysis



An important component of the project implementation plan is the task analysis. The task analysis is a breakdown of discrete tasks (steps) that Volunteers must conduct with their work partners to accomplish project objectives. The task analysis includes detailing resources and tools needed to accomplish the activities. As depicted in this graphic, the task analysis is a major link between programming and training and is necessary for determining Volunteer learning needs and designing training responsive to those needs. It is the result of a detailed examination of the observable tasks associated with the execution or completion of the project goals and objectives, with input from Volunteer experience as well as other key stakeholders, such as work partners, host country agencies, and post staff. The task analysis is valuable for:

- **Training.** The task analysis, along with global core and global sector KSAs, make up the core and sector competencies for the project and learning objectives that result in training for the project. The better the quality and detail of the task analysis, the more effective Volunteer training will be for the work that Volunteers must perform to meet project objectives. It is particularly important to identify the linguistic proficiency needed to complete each task successfully so that the continuum of training and learning events are in alignment with the time period that tasks will be completed in the community of service.

- **Volunteers and their work partner or counterparts.** The task analysis can be a valuable tool to help Volunteers and work partners map out the sequence of work they will perform toward meeting project objectives, building a common understanding of the role of the Volunteer, and setting expectations and boundaries on the types of work that the Volunteer can perform.

- **The APCD/PM.** The process of engaging in a task analysis can assist the APCD/PM in identifying the tools and resources that Volunteers and work partners can use to carry out their work more effectively. The task analysis portions referring to assessment steps provide an excellent basis for the development of the Volunteer community/sector assessment assignment.

Task analysis development is an ongoing process that is led by the APCD/PM, but should include input from all project stakeholders. As the monitoring and evaluation plan, training design, and the Volunteer community/sector assessment assignment are developed and revised, it is possible that discoveries will inform the task analysis. APCD/PMs should revisit and update the task analysis when the MRE Action Plan and the Volunteer community/sector assessments are complete. See the links below for characteristics of a quality task analysis in different formats. The following categorization of tasks may be useful for organizing the task analysis:

1. Community/organizational entry tasks

2. Participatory assessment/baseline data collection tasks
3. Activities development tasks
4. Monitoring/record-keeping tasks
5. Assessment of process and outcomes indicators and reporting tasks

To verify that the task analysis is clear, achievable, and complete, compare your task analysis to the criteria in the document, *Characteristics of a Quality Task Analysis* (linked below), as well as the following questions:

1. Is Volunteer work with work partners/counterparts--as opposed to individual work that a Volunteer undertakes alone—appropriately emphasized?
2. Will accomplishing the tasks lead to achievement of project goals and objectives?
3. Are the tasks specific enough to inform training by determining the knowledge, skills, and attitudes necessary for a Volunteer to succeed?
4. Are tasks realistic, given available and requested AAs, training resources, and linguistic proficiency needs?
5. Are any tasks missing or unclear?

Select Resources

- Key Considerations for Developing Tasks
- Characteristics of a Quality Task Analysis

E.5 Training Considerations

The APCD/PM should coordinate work with the training manager to complete the training, design, and evaluation (TDE) process, defining core and sector competencies, learning objectives, the calendar of training, session designs, and training evaluation. Refer to Part 3 of this guidance for more information.

As a result of this effort, the APCD/PM, training manager (TM), and language and cross-culture coordinators (LCCs) can discuss key issues related to training design and resources, including:

- The use of global core, sector training packages and terminal learning objectives.
- Language requirements for Volunteers.
- Major technical knowledge/skills Volunteers will need.
- How the task analysis, KSAs, competencies, and learning objectives drive Calendar of Training Events (COTE) development, training site selection, and the continuum of learning (PSTs and ISTs).
- Training staffing considerations necessary for designing, developing, implementing, and evaluating learning.

PC/Washington programming and training specialists may also be able to help identify training sessions that align with specific SIs. Furthermore, as programmers define the appropriate role for Volunteers (see Section D.3, The Peace Corps Niche), expectations for the types of Volunteers who can be recruited and the level of technical training they will need should be discussed with recruitment staff in PC/W and training staff at post. This dialogue should continue as revisions are made in the project framework and in the requests for Volunteers.

E.6 Resources to Consider for Project Implementation

Peace Corps projects require a standard package of resources for project implementation, including training resources, Volunteer allowances, housing arrangements, medical services and supplies, and general equipment and supplies for staff and Volunteers. While Peace Corps funding is available for these basic costs, partners can demonstrate commitment, help reduce post costs, and support additional items that can enhance project success beyond the core elements and costs.

The following table summarizes resources that your project might need as well as considerations and ideas on potential sources of support. Planning ahead for these resources will ensure the maximum effectiveness of your project. For example, you should work with host country agency and community partners to identify financial, material, and human resources that they or other organizations can provide. For information about funding options, refer to Part 4 of this guidance: Section A.1, Agencywide Planning and Budgeting Processes, and Section A.2, Funding Sources to Support Programming and Training.

Resources Needs to Consider for Project Implementation	Considerations and Potential Sources of Support
Volunteer transportation to field sites, special tools, and materials	Volunteer work may be severely limited without these. Local contribution to these costs is very appropriate.
Training for supervisors and work partners	Some restrictions apply to Peace Corps funding of these costs. CD needs to review the four possible scenarios in which counterpart costs are justified. See Part 4.
Tools and materials for PST and/or IST	Training effectiveness may be compromised without these.
Technical training materials (guides)	Whether these materials are offered by Peace Corps, purchased, or produced at your post, the availability of these will affect the quality of training and Volunteer support.
Sector-based MRE training and materials (guides, checklists, and resource packets)	Timing MRE trainings to link with expected tasks provides a successful model. This cannot always be accomplished, but working toward this goal will likely yield higher-quality results.
Project Advisory Committee meetings	Lack of funding is often a factor in preventing annual Project Advisory Committee meetings. However, an active PAC is critical to the Peace Corps approach to development.
Project review	Both PC/W and post funds contribute to the cost of these periodic events.
Very small project funds ($200 or less) for Volunteer work	Access to these small funds can impact Volunteer effectiveness (e.g., seeds for a demonstration gardening project).
Small project funds ($500-$6,000) for Volunteer- supported projects	Partnerships with organizations can complement and enhance Volunteer work. See the *Small Grants Staff Handbook* for more information.

F. Step 4: Develop a Monitoring, Reporting, and Evaluation Plan

Effective monitoring, reporting, and evaluation allow posts to better align Volunteer training, enhance project design and implementation, and increase the quality of results for beneficiaries and for the Volunteer experience. Sound monitoring and evaluation for the Peace Corps cannot be accomplished without stakeholder involvement.

F.1 The MRE Action Plan

A strong monitoring, reporting, and evaluation (MRE) action plan is a valuable roadmap to ensure that relevant information is gathered to assess project implementation, make necessary changes to the project framework, and revise the implementation plan to improve its effectiveness. While a brief summary of the MRE action plan is included within the overall project plan, the details of the MRE action plan, including assessment tools, should be separately documented. Because the standards and processes for quality monitoring and evaluation are in a state of change throughout the agency, this section of the guidance will supply minimum standards and good practices. It will also provide links to the most current resources, tools, and guidance whenever possible.

MRE action plans should incorporate the following actions:

A. Design and develop systems based on reporting and evidence-based decision needs. Prepare Volunteers for data collection.
B. Collect high-quality monitoring data and internally report on progress toward project goals.
C. Analyze and interpret data; report, share, and learn from data.
D. Assess progress, processes, and make revisions and decisions based on evidence.

Additional details, highlights, and the template for developing an MRE action plan can be found in the MRE Toolkit.

Monitoring is the ongoing review of project activities and performance. It measures the extent to which: (a) implementation is occurring; and (b) outcomes are being realized. Monitoring actually begins prior to project implementation, alongside the establishment of feasible expectations and efficient data collection and reporting systems. Data gathered prior to project implementation provides baseline information for subsequent comparison. In this way, the impact of a project and the change that is potentially attributable to it can be measured. Monitoring continues throughout the project and is important for assessing the extent to which the project is being implemented as intended, as well as the extent to which project goals and objectives are being met.

Evaluation is a systematic, objective study conducted periodically or on an ad hoc basis that assesses how well a project is working, likely reasons behind successes, and needs for improvement. Because evaluation studies offer causal information about how and why a project is (or is not) performing, they can help staff determine if timely adjustments are needed in program design to improve the rate or quality of achievement relative to the committed resources. Monitoring data should inform an evaluation, but, by itself, data does not constitute an evaluation.

F.1.1 Determine Data-Reporting and Decision-Making Expectations

One feature of strong MRE systems is that they begin with the end in mind. For example, knowing the differences we hope will exist for a post in five years sets the goals and all that follows for orienting a project to achieve those goals. Addressing reporting and evidence-based, decision-making needs establishes minimum measurement needs for a project.

All reporting and decision making should include strong evidence collected through professionally accepted methods. The MRE Toolkit outlines the primary and more global reporting expectations, such as Volunteer feedback, ministry reports, community feedback presentations and/ or reports, partnership reports, congressional reports, and public outreach statements. Additionally, counterpart feedback and local partnership feedback are also reasons for collecting, reviewing, analyzing, and using community-level data.

Decision making regarding the Integrated Planning and Budget System (IPBS), project frameworks, project activities, site assignments, site assessments, indicators to measure, methods and tools for measurement and reporting, and training needs and foci are all appropriately reviewed and revised based on evidence collected from Volunteers and counterparts using data collection tools the agency has in place.

1. The counterpart survey can provide excellent insights about counterpart training needs and capacity building opportunities.
2. The Annual Volunteer Survey (AVS) provides Volunteer feedback on community integration and self-perceived program effectiveness.
3. The Volunteer Reporting Tool (VRT) provides data from the standpoint of beneficiaries to help accurately gauge the value of Volunteer activities. Success stories and feedback from both Volunteers and post staff provide information about best practices, challenges, and ways Volunteers and counterparts have worked together to address local needs.

These rich data sources provide not only useful quantitative and qualitative data to share among stakeholders, but they also provide key pieces of information upon which to base future decisions. The higher the quality of data requested, collected, and analyzed, the better post can appropriately apply data for high-quality decision making and future planning.

F.1.2 Integrate the Data Quality Assessment Process

High-quality data is imperative for evidence-based decision making and reporting. Data must meet critical criteria for quality in order for decisions to be made confidently and for the Peace Corps to stand behind the data used in reports. Appended to the MRE Toolkit is a Data Quality Assessment (DQA) guidance that instructs Volunteers, posts, and PC/Washington on how to collect, report, and use trustworthy data to measure progress in meeting community goals. The guidance provides tools to ensure that the data and information about Volunteer service that is reported to communities is of the highest quality—both in terms of accuracy and timeliness. There is a need for both internal (reflective) and external (audited) assurance of quality data collection, reporting, and use. Posts are expected to utilize the DQA guidance and accompanying checklists with appropriate staff and Volunteers and to provide evidence of data quality checks to PC/Washington as part of a project's MRE action plan. Similar data quality checks at PC/Washington are used throughout data analysis, reporting, and use processes.

F.1.3 Compile the Volunteer MRE Resource Packet

It can be challenging for Volunteers to find access to online resources at some sites. Posts are encouraged to provide each Volunteer with the following items in a folder on a flash drive (please note that some of these are available from Peace Corps Washington, and some need to be developed at post):

- MRE Toolkit
- Sector-specific project framework
- VRF form (a PDF hard copy) showing them the fields they will be expected to fill out

- Data sheets for each SI and PDI in their project framework
- Data collection methods decision-making matrix
- Data collection training materials for each method associated with their data reference sheets
- Data collection and tracking tools for each SI/ PDI they will be expected to measure (can be combined)
- VRF instructions
- Guidance for writing high-quality success stories

Along with the electronic folder, posts have found that Volunteers appreciate receiving a tracking booklet in which to record key pieces of information about their work during their service. Posts may choose to create one booklet per project or one booklet for the post. OPATS has created guidance and templates that posts can adapt for their use. These resources, as well as a notebook for additional notes, can be useful in building the capacity of Volunteers and partners/ counterparts to develop their MRE skills and the quality of the data they collect and report.

F.2 The Role of Volunteers in MRE

F.2.1 The Volunteer Community/Sector Assessment

Volunteers should spend their first three to four months at site actively getting to know people, organizations, and local issues. During this time, Volunteers should also: (1) build trust; (2) gain an understanding of local attitudes and perspectives, skills, behaviors, roles, relationships, assets, resources, and obstacles that will likely affect their well-being and work; and (3) within their language abilities, gather baseline data related to impacts that Volunteer work may have on the community. When the Peace Corps provides the knowledge, tools, and skills that assist Volunteers to use their first three to four months effectively, it can make a significant difference in the quality and value of their entire service. The APCD/PM is responsible for identifying, developing, and facilitating the development of specific assessment tools directly related to the project's purpose, goals, and objectives. These tools supplement the general community assessment tools used in pre-service training.

The Volunteer community/sector assessment, which is developed and tailored to match the needs of each project at post, provides Volunteers with tools and strategies for their first three months at site to help them carry out effective activities that meet each of the following goals:

- **Community entry**: Participatory analysis for community action (PACA) tools, including community mapping, seasonal calendars, daily activity schedules, and gender analysis, help Volunteers build trust, understand community dynamics, and gather information about the groups that are active in the community, what they are currently doing, and what they have tried in the past that has succeeded or failed. The use of these tools with community members can also help community members assume ownership of new information or insights into how they would like to improve their communities.

- **Site-level baseline assessment**: Project assessment tools are used by Volunteers and work partners to gather information related to the project purpose, goals, and objectives. The baseline data initially gathered is compared to data collected later in a Volunteer's service to determine the extent to which outcomes have been realized. Volunteers do not always report project information (e.g., community health data) on a monthly basis, but rather at the beginning, perhaps the middle, and the end of their service (or the beginning of the service of the next Volunteer). Similar to organizational diagnostic tools, this information can help Volunteers determine an appropriate focus for their work.

- **Participatory discussion of perceptions, data, and priorities**: The participatory processes outlined in the PACA manual help groups discuss and identify community strengths and priorities for change. These processes also guide Volunteers' first steps for using appreciative inquiry (Discover, Dream, Design) in their communities. The analysis will likely reflect the results of the baseline data collection (including the collection of gender-disaggregated data). The general focus of the change expected as a result of Volunteer activities will be defined by the project plan; however, the activities and outputs can be flexible to ensure that they reflect local priorities. Not all Volunteers will necessarily contribute to all project goals and objectives.
- **Activity design and planning**: Planning tools, checklists, and timelines help Volunteers and their work partners design and plan prioritized activities.
- **Monitoring Tools:** Volunteers are asked to monitor the work they are doing and the effect it is having on their community members. Data collection tools provided by post staff, along with data collection methods training, are used to collect data toward project framework indicators. See D5, above.

F.2.2 Volunteer Report Forms (VRF)

The Volunteer Report Form (VRF) is a form that Volunteers use for periodic reporting. Posts determine how frequently VRFs are submitted—typically two to four times per year, with the first reporting period starting on October 1 and the final reporting period ending on September 30.

Information from the VRFs is imported into a post's Volunteer Reporting Tool (VRT). The VRF includes sections on community integration, challenges, successes, plans for upcoming work, and reports on the activities Volunteers conduct to support the Peace Corps' three goals. Volunteers' activity entries include information on participants, outputs, and outcomes, as well as information pertaining to the Peace Corps CSPPs, initiatives, and collaborating partners.

F.3 The Role of Partners in MRE

Partners play a key role in project monitoring and evaluation, beginning with their participation in defining the project purpose, goals, objectives, and activities. For further reading on participatory program evaluation, see the *Participatory Program Evaluation* resource, originally developed by Catholic Relief Services. Opportunities to train or reinforce training of partners include orientation day (counterpart day), the project design and management workshop (PDM), and other workshops in which work partners participate.

F.3.1 Partner Training in MRE

To the extent that APCDs/PMs expect partners to play a role in project monitoring and evaluation, they need to consider how those partners will be trained to fulfill their roles. Partners need to understand which information is gathered and how it will be used. They should understand the purpose of each assessment method or tool and its correct use. Both APCDs/PMs and Volunteers play a role in training partners about their role in MRE.

F.3.2 Partner Use of MRE Tools

Ideally, partners will be engaged in project monitoring and evaluation, providing and/or using MRE tools with, or supported by, Volunteers and using the information they provide to inform their efforts. The best monitoring and evaluation tools are developed for the language and education level of those who will use them.

F.3.3 Partner Review and Discussion of MRE Information with Volunteers

Posts and APCDs/PMs have developed various systems for Volunteers to share information with partners without creating an undue burden for Volunteers. Some strategies include:

- Using the post-defined section of the VRT to include questions specifically in the country's language(s) designed for Volunteers to write in that language and share with their partners.
- Instructing Volunteers to write certain VRT sections in a language that their partners understand.
- Creating a one-page monthly report form for Volunteers to discuss with partners.

The concept is for Volunteers to share and discuss with their partners information about how they are spending their time, past successes and lessons learned, progress toward goals and objectives, and planning for upcoming events.

F.3.4 Agency Partner Feedback

All projects should also engage partners in providing feedback to the Peace Corps about how the project is going. The ideal form for communicating and documenting partner observations will vary from project to project, and may even vary depending on the partners. Note that parts of the VRF can be written in the national language if posts use that tool to incorporate partner input. Posts may also request regular MRE reports from partners.

In addition, posts must report about agency indicators under the agency's performance goal 1.3.1: Increase the effectiveness of skills transfer to host country individuals and communities, which is: "percentage of partner organizations at post that report their assigned Volunteer fulfilled their requested need for technical assistance."

Options for gathering information include:

- Informal discussions during site visits. It is prudent to pose specific questions to host agencies to solicit honest, constructive feedback.
- Scheduled phone calls—again, with specific questions.
- A hard copy or online survey. These can be anonymous or partner-identified.

F.3.5 PAC Meetings

A Project Advisory Committee (PAC) serves as an advisory body to the APCD/PM. It provides valuable input to continually strengthen the project focus, and it collaborates with other organizations to maximize project effectiveness in meeting its goals, objectives, and the evolving priorities of the host country. It also contributes to the legitimacy and recognition of the project.

An active PAC:

- Reviews and evaluates project results every year and interprets data at PAC meetings. If this is not possible, feedback can be gathered through one-on-one meetings, regional meetings, conference calls, emails, or phone calls.
- Meets at least once a year to review project monitoring and evaluation information, celebrate successes, and recommend any revisions to the project framework or strategy.
- Engages in project redesign, as appropriate; during this stage, PACs should help identify existing (national, regional, and local) data related to the target issue(s),as well as any tools that are being used to gather data or that may be used by Volunteers at the community level.

F.4 The Role of Post Staff in MRE

F.4.1 MRE Information Analysis

Data interpretation provides an excellent opportunity to bring together groups of key stakeholders to discuss monitoring and evaluation information and make judgments about project goals, objectives, outcomes, and activities. The stakeholders are likely to bring different perspectives to data interpretation and will usually have greater confidence in the results if they have helped with the analysis. Involving stakeholders (both women and men) in data analysis also provides them with immediate feedback so they can adjust projects as necessary.

MRE information analysis can be conducted as part of PAC meetings, ISTs, or other workshops, and it can be facilitated by Volunteers and their partners in community meetings. After presenting summaries of the data, ask stakeholders to address the following questions:

- Do these summaries seem valid and accurate? If not, what is missing?
- If the summaries do seem accurate, how could the information be used by this community, project, or NGO?
- If the results show change over time, what brought about this change?
- Is the change enough or is more needed?
- If more change is needed, what do we want to do about it?
- Is the change aligned with the national development goals?

F.5 Status Reports (SRs)

The annual SR process, which includes project status reports (PSR), training status reports (TSR), Cross-Sector Programming Priorities reports (CSPPRs), and partnership reports (PRs), requires that all PT&E staff summarize information collected throughout the year as part of the monitoring and evaluation process.

The PSR is the standardized agency document that provides annual information on the work of Volunteers and the progress of each project. Information summarized in the PSR provides an opportunity for project stakeholders, posts, and PC/W to identify, reflect, and report on project activities, capacity-building efforts, project outcomes, strengths, challenges, lessons learned and promising practices, follow-up actions, and specific Volunteer successes. The CSPPR provides an opportunity for posts to consider how agency CSPPs are being addressed post-wide.

The PSR and CSPPR should also capture PT&E staff reflections on how the project can continually improve, in consultation with Volunteers and partners. This may result in refining the objectives, strengthening training, or engaging in more targeted activities within objectives.

In addition to the PSR and CSPPR, program staff should use the TSR and PR to supplement their reflections on the status of each project. TSRs facilitate adjustments to training while PRs identify ways to more strategically expand or refine partnerships.

F.6 Assessments of the First and Second Peace Corps Goals

Through the VRT and other channels, Volunteers provide information on how their work impacts project goals, CSPPs, and the First and Second Goals of the Peace Corps.

Host country nationals also provide information on the impact that Volunteers have had on their understanding of Americans (the Second Goal). A survey is one example of a tool for obtaining information about host community members’ understanding of Americans as a result of their experiences living with Volunteers.

F.7 Other Types of Evaluations

In addition to the discussion of project reviews in Section C.3, Analysis of Existing Projects, posts may engage in other types of evaluation, as outlined here.

F.7.1 Other Evaluations

Posts may choose to conduct or request support to conduct evaluation activities at any time, but major activities should be planned well in advance to secure resources. The phrase "evaluation activities" is used to capture a broad range of evaluation work on various levels that a post might choose to pursue, depending on its information needs and the intended use of the findings. Examples include:

- An evaluation of the implementation and short-term outcomes of a common Volunteer activity, such as promoting fuel-efficient stoves or leading summer camps.
- An evaluation of the sustainability and impact of Volunteer activities two to three years after completion.
- An evaluation of PST Kirkpatrick levels three and four, including interviews and observation of Volunteers and partners/counterparts in different stages of service for their demonstration of application of knowledge, skills, and attitudes gained during PST and the impact of those applied.
- A study of the influence of Volunteers' and partners' work on changes in a particular project sector beyond individual Volunteer efforts, conducted with PAC participation.

Most post-led evaluations are conducted with the participation of post staff, Volunteers, and community members who help design, carry out, and use aspects of the evaluation. The results are intended to be immediately useable by a post in-country. Since time and resources to conduct evaluations are often limited, there are several ways posts can receive funding and assistance for evaluation activities.

Note that Small Project Assistance (SPA) funds may be used to support a country-level evaluation of past SPA projects, including travel costs for Volunteers and staff and funding for consultants. These evaluation activities are scheduled in the operating plan phase. Most years, posts may also request support for evaluations from OPATS or other PC/W staff through an annual process guided by the regions. Consultants can help design a study, design the survey instrument or structured observation rubric, train Volunteer researchers, and help interpret and share the results.

F.7.2 OSIRP Impact Evaluations

In recent years, the Peace Corps' Office of Strategic Information, Research, and Planning (OSIRP) has conducted studies to obtain feedback from host country nationals about their understanding of Americans and the outcomes achieved. These evaluations targeted data about project processes and outcomes of Volunteers' activities related to the First Goal, as well as Second Goal impacts (the extent to which Volunteers provide a better understanding of Americans on the part of the host country individuals).

These field evaluations:

- Provided important information about host country national views of Peace Corps achievements related to the Peace Corps' First and Second Goals.
- Provided tools that posts have continued to use independently to gather data about project success from the HCN perspective.

The studies were funded by PC/W and conducted largely by researchers with whom the post contracted in-country.

G. Step 5: Project Documentation, Communication, and Close-out

A sound development process for a project plan will result in a strong project. Good documentation of the project plan and associated materials is important for communicating with programming and training staff (particularly new staff), Volunteer Recruitment and Selection (VRS), invitees, trainees, Volunteers, and PC/W support staff.

G.1 Understanding the Project Plan

Strong documentation of your project through the project plan helps to build an understanding on the part of host agencies, staff, and Volunteers on the project goals, objectives, and strategies. A suggested outline for the project plan is given below. The core text of the project plan should cover each of the components while being concise (no more than 18 to 20 pages). It should also be easily translatable for distribution to local partners and easily updated as changes are made to the project plan.

Project Plan Outline

Executive Summary

Part 1: Project Background

1.1 Project Development

1.2 Situation Analysis

Part 2: Project Role

2.1 The Peace Corps' Niche

2.2 Summary of What Volunteers Will Do

2.3 Project Framework

Part 3: Implementation Plan

3.1 Principal Partners

3.2 Strategy for Site Selection and Assignment

3.3 Numbers and Skills of Volunteers

Part 4: Overview of Training

Part 5: Summary of MRE Action Plan

Part 6: Task Analysis

Required Appendix

Sector Terminal Learning Objectives

Optional Appendix:

History of Project Development

More detailed guidance for each section of the project plan is found in the hyperlinked *Project Plan Sections Instructions* and *Project Plan Completion Checklist* below. There are strong examples of complete project plans hyperlinked within each sector's guidance. Note that some of these are not in the project plan format outlined above, yet they have been chosen as strong examples because of the overall strength of the plan.

Select Resources

- Project Plan Checklist
- Project Plan Section Instructions

G.2 Communicating the Project Results and MRE Information

Effective monitoring, reporting, and evaluation allow us to improve Volunteer training, enhance project design and implementation, and improve project results. Strong MRE also allows us to communicate project successes more effectively. Therefore, the monitoring and evaluation plan should include periodic communication of the results (including progress toward project goals and objectives, challenges, successes, lessons learned, and recommendations) to Volunteers, community members, and partners.

Some tips on communicating results and findings of your monitoring and evaluation efforts include the following:

- **Involve Volunteers and work partners** in presenting and discussing the results. Sharing information will both motivate them to provide good information and enable them to use results to make modifications to their activities. Sharing results with all stakeholders helps create a demand for such information, which increases the likelihood that results will be used.

- **Consider the content**: Information should be meaningful to stakeholders—information that is obvious or redundant is generally not helpful. Information should be in the appropriate language and avoid jargon. Stakeholders should be able to do something with the information, whether learning, sharing the information, or using the information to change approaches.

- **Present information in the right form:** Different people will want to receive information in different forms. Few people have the time or motivation to read lengthy reports, so aim for short and simple, with a summary of key findings, an analysis of what the findings mean, and recommendations and suggestions.

- **Explore different types of presentations,** including flip charts, PowerPoint, graphs, drawings, videos, music, role-play, and even dance, to highlight essential ideas when presenting results to a group, staff, or community. Have stakeholders tell stories or create case studies from unique and notable examples—both of those who benefited from the program and those who did not.

- **Consider the timing of information shared:** Stakeholders must receive information at the best time for them to do something with it. If too much time passes between gathering and sharing information, the results may be outdated. In an agricultural project, for example, information on planting practices should be presented and discussed well before planting season so there is time to make changes.

G.3 Maintaining a Living Project Plan

The project plan should be a "living document," which means:

- **It is kept up-to-date** and is modified as conditions change or as the project matures.
- **It is regularly used**. Volunteers and partners should be able to explain project goals and objectives clearly and succinctly to community members.

For a new plan, expect to make changes to at least the task analysis after the first year of implementation.

Always send PC/W an updated version of the project plan after revising, and keep an electronic and hard copy record of the original plan and each revision. Also, the SRs should highlight (or summarize in an annex) any changes made in the year reported to the project framework. *Do not forget to review if changes to the JSR, VAD, or VRT are needed when you update the project plan.*

Consider how you will communicate and use your project plan. Although PC/W requires a version of the project plan in English, you can translate all or part of the document into a local language to facilitate communication with partners and other stakeholders. The simpler and more succinct your plan is, the more easily it can be translated, used, and adapted.

Project History Documentation

A good management practice of many APCDs/PMs is to keep a project history notebook that contains:

- The concept paper.
- All versions of the project plan.
- All memoranda of understanding (MOUs) at the national and regional levels.
- All versions of the JSR.
- All training reports.
- All PSRs.
- The current Volunteer assignment description (VAD).

These documents are kept in chronological order so a living history of the project plan and related documents is maintained and accessible to anyone reading the notebook. Posts also keep organized electronic versions of all of the above files. These notebooks and electronic files are particularly valuable for new staff and for reference during project reviews and evaluations.

Site History Documentation

These documents complement site history documentation—usually filed by site—which records information that may affect site selection. See MS 270 as well as Part 4 of this PT&E Guidance: Management and Implementation, Section D, Site Identification and Preparation, for more information on site history documentation.

G.4 Closing a Project

Peace Corps projects are not intended to continue perpetually, but they should also not be closed arbitrarily. They are intended to be dynamic, proactive responses to host country needs which maximize the Peace Corps' resources and impact in-country. This section outlines considerations and procedures for closing a project. In all cases, posts should review and comply with all aspects of MS 341: Non-emergency Post Closing that apply (see sections on responsibilities, personnel, and records) and should consult both with Region and the embassy prior to making final decisions, as outlined below and in the Peace Corps–State Department relations cable.

Why Close a Project?

Peace Corps staff may recommend project closure if any or several of the following criteria are met:

- **The host country no longer needs Peace Corps support in this area** because it has achieved its goals related to the project. Alternatively, the skills and capacity to carry out the goals of the project have successfully been established within host country organizations.

- **Priorities of the host country and/or the Peace Corps have changed.** The project focus is no longer a high priority for the host country or region, or the strategic priorities of the Peace Corps have changed.
- **Reduced Volunteer numbers or projects in-country.** For strategic, safety and/or budgetary reasons, the Peace Corps is reducing the total number of projects or Volunteers in a country.
- **The project is not working and cannot be fixed**. If a project is clearly not meeting its goals and objectives or not adding value to a sector (see Section C.3 Project Reviews under the sub-heading, Ask an Expert: Does This Project Require a Significant Revision?), a post should carefully consider the options of:
    - Re-designing the existing project. This option may be appropriate if leadership staff at post and the PAC believe that the project could be an effective project if re-designed. This option has been carried out successfully in many cases.
    - Closing the project. It may be the best option to re-direct resources toward higher priorities, where Volunteers can have a greater impact.

Project closure decisions and decisions to move projects in significantly new directions should be made well in advance of the implementation of changes, so that invitees have appropriate expectations, recently arrived trainees do not arrive in-country to find that their project does not exist or has been significantly changed, and all Volunteers in-country may complete the assignment for which they have been trained.

The Decision to Close a Project

The decision to close a project is made at post as an integral part of the post's strategic planning processes. Normally, this decision is made well in advance of actual project closure and is part of a post's Integrated Planning and Budget System (IPBS) process. However, under exceptional circumstances—such as for safety or financial reasons—projects may also be closed more rapidly. The country director makes the final decision to close a project, based on a recommendation from the director of programming and training and concurrence from Region.

Procedures for Closing a Project

While the following outlines the procedures for closing a project, note that some of the items may also apply to a project that is being significantly revised. Also note that these procedures are normally included in a post's Integrated Planning and Budget System (IPBS) processes. For example, a Region may require a project closure action plan as an annex to an IPBS strategic plan.

- The DPT takes the lead in a post's analysis of alternatives to optimize use of Peace Corps resources and maximize impact in the host country, with input from the CD, APCD/project manager, Project Advisory Committee, sector specialist, ChiPT, Volunteers, and partners.
- The DPT summarizes the analysis and makes a project closure recommendation to the country director.
- The CD sends the PC/W regional office a project closure recommendation memorandum that includes the rationale for the decision, participants in the decision, anticipated staffing and budgetary impacts, and an anticipated timeline. See an example of a content memo hyperlinked below.
- The CD also consults with the embassy prior to finalizing the decision, as required by the Peace Corps–State Department relations cable, linked in the previous section.
- Region concurs with the project closure recommendation or sends alternative instructions (e.g., requesting that a project review be conducted prior to a final recommendation).

- The programming staff, in consultation with Region, develops a project closure action plan, including the following elements: roles and responsibilities, communications, programming, records, administrative and personnel, and timeline. Refer to the link below for a checklist of project closure action plan elements, noting that a post should conduct a project evaluation unless it faces security or financial restrictions that would prevent this. Ideally, this evaluation should be conducted by an independent host country consultant or organization to maximize its objectivity. See Section C.3.1, Project Reviews.
- Region reviews and provides input to the project closure action plan.
- Implement the project closure action plan.

Documentation of Project at Closure

When projects are closed, DPTs and APCDs/PMs should create a detailed closure report and organize electronic files. These documents are important for:

- Partner organizations to understand and build upon the work done by the Peace Corps in the country.
- Programming staff that may, in the future, re-initiate activities that build upon project successes.
- The Peace Corps for impact evaluations.
- Programming staff in other countries to incorporate any lessons learned related to future project plans and activities.

The project closure reports should also be shared with the sector specialist to become part of the sector learning and resources for the future. For contents of the *Project Closure Report*, see MS 341, Section 6.1.

Select Resources

- Sample template for project closure decision memo
- Checklist of project closure action plan elements
- Project closure report outline
- Template for a phase-out action plan

Part 3: Training Design & Evaluation

- Overview of Peace Corps Training
- Peace Corps Training Standards and Resources
- Adult Learning and the Experiential Learning Cycle
- Overview of the Training Design and Evaluation (TDE) Process
- Volunteer Learning Continuum
- Staff Training
- Additional Resources for Training

Overview of Peace Corps Training

Training for Volunteers provides the knowledge, skills, and attitudes (KSAs) related to intercultural competence, language proficiency, safety, administration, health, and technical fields needed for Peace Corps service. KSAs equip Volunteers with the necessary tools to successfully integrate into their host country communities and collaborate with partners to achieve project objectives. Training enables Volunteers to meet project goals and objectives throughout their 27 months of service.

Peace Corps' approach to training is grounded in the principles of adult experiential learning. Part 3 of the PT&E Guidance includes the following:

- Peace Corps Training Standards and Resources
- Adult Learning and the Experiential Learning Cycle
- Overview of the Training Design and Evaluation (TDE) Process
- The Volunteer-Learning Continuum
- Staff Training
- Additional Resources for Training

A. Peace Corps Training Standards and Resources

A.1 Global Learning Standards

In the past, each Peace Corps post conducted its own Training Design and Evaluation (TDE) process, identifying training needs and developing resources independently. Although this approach accommodated posts' needs for customizing training to local contexts, it also meant that many posts were developing similar resources on the same topics, and that there was not always consistency in the quality of training across the agency.

In response to Focus In/Train Up—the second strategy from the Peace Corps' 2010 Comprehensive Agency Assessment—OPATS worked in collaboration with the field, regions, and OGHH to create standards ensuring that trainees and Volunteers receive consistent, high-quality training worldwide. To do this, OPATS conducted the TDE process at the global level. As a result, the Peace Corps identified three core competencies that are essential for all trainees and Volunteers.

All Peace Corps Volunteers and trainees should:

- Integrate into their communities;
- Facilitate participatory community development; and
- Exemplify professionalism in their Peace Corps service.

In addition to these core competencies, more specific, global competencies were also developed for each of the six Peace Corps sectors. These competencies address the technical knowledge, skills, and attitudes that every Volunteer needs to work successfully within a particular sector. The competencies include increased training in monitoring, reporting, and evaluation, so that Volunteers are better equipped to demonstrate and share their contributions toward the development of their respective host countries. The global core and sector competencies now guide training for all Peace Corps Volunteers worldwide, providing agency-wide standards and a foundation upon which posts can build and adapt their training programs to fit locally specific conditions.

In order to help trainees, staff, posts, and the agency ensure that they have achieved a global standard of excellence in training, each global core and global sector competency is evaluated based on terminal learning objectives (TLOs), which outline the specific KSAs that every trainee should demonstrate. Posts are expected to tailor training toward and assess the TLOs at the global core and global sector levels, as outlined in the agency's December 2013 Global Learning Standards memo.

Please refer to the Programming, Training, and Evaluation Resources page on the Peace Corps intranet and follow the links to the Global Core landing page or the appropriate sector to view a complete list of terminal learning objectives. These TLOs serve as the standards and levels of training required for every Volunteer. Posts have the flexibility to use any available resources in training, provided that they are working toward achieving the global core and global sector TLOs.

A.2 Training Resources for Global Core and Sector

The global core represents the areas that all Volunteers should master, regardless of their post or project. Global core session plans were developed through a collaborative process that included OPATS, the Office of Global Health and HIV (OGHH), the Office of Health Services (OHS), the Office of Safety and Security (OSS), and regional and overseas staff. The session plans are a resource available to posts to support high-quality and consistent content, so that all Peace Corps trainees and Volunteers have the same opportunity to achieve the TLOs and the three core competencies noted above. With the exception of some of the safety and security sessions,[2] posts have the option of using the global core sessions, adapting them, or designing their own sessions. The TDE process provides posts with the information they need to determine how to adapt the PT&E Resources to local contexts.

Additionally, each sector has a set of training resources (both training sessions and manuals) that align with the sector competencies. These training resources are informed by best practices in the field, and they are designed to be adaptable for each post and, to some extent, for each project. Refer to the hyperlinks at the end of Part 3 for additional resources that can supplement post training programs.

B. Adult Learning and the Experiential Learning Cycle

Peace Corps training should focus on the specific needs of Peace Corps Volunteers in practical, functional ways. Training should build on Volunteers' existing experience and skills, reflect Volunteer diversity and background, and draw on principles of adult learning. Training should help learners develop relevant skills that they can apply to project-related needs at site. To the extent possible, Peace Corps training is therefore designed using a model known as the 4MAT framework. The 4MAT framework builds on the experiential learning cycle to ensure that learning events demonstrate relevance, activate existing knowledge and skills, and provide opportunities to apply new knowledge and skills to relevant work tasks. Similarly, language training focuses on enabling learners to use a new language to communicate in real-life situations, rather than on the isolated study of vocabulary or grammar.

B.1 Principles of Adult Learning

Peace Corps training incorporates twelve principles of adult learning—identified and elaborated by Jane Vella, author and the founder of Global Learning Partners, in her influential book, *Learning to Listen, Learning to Teach.*[3] The principles outline important considerations for designing education and training

[2] Consult PC/Washington, Office of Safety and Security, for updated guidance and expectations of session implementation.

[3] Vella, Jane. 2002. *Learning to Listen, Learning to Teach*. San Francisco: Jossey-Bass.

for adult learners. They also prioritize the cognitive, psychological, and professional needs of learners and promote a model of education in which knowledge and skills are actively constructed by learners in dialogue with each other and an instructor, and generated through the interaction between their experiences and ideas.

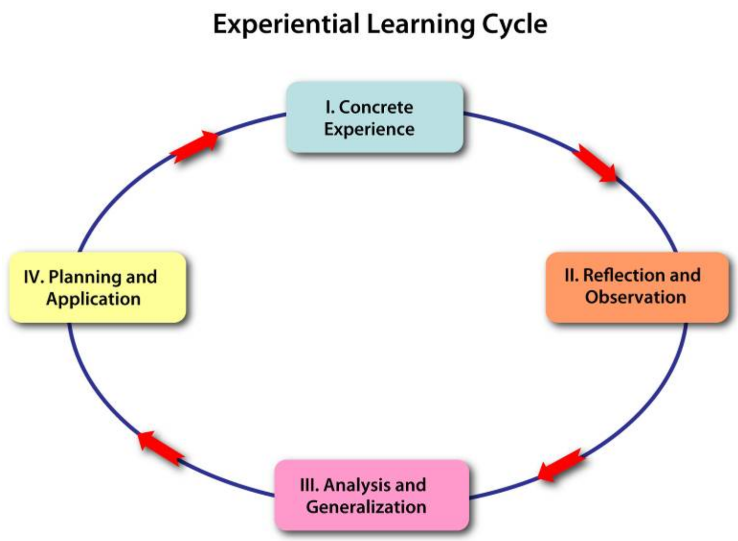
The principles are as follows:

1. **Needs assessment**: Before any training program begins, it is essential to identify the various needs, experience levels, and expectations of the adult learners.
2. **Safety**: Adults require a safe learning environment. This environment is reflected in the atmosphere of the training space, design of learning tasks and materials, and trust of the trainer and process.
3. **Sound relationships**: In the case of Peace Corps training, adult learning is a dialogue between trainer and Volunteer as well as among Volunteers. These relationships require attentive listening and mutual respect.
4. **Sequence and reinforcement**: Content needs to be properly sequenced according to its level of difficulty, from simple to complex. The trainer should also build reinforcement into the training design.
5. **Praxis**: This means "action with reflection." It is important for learners to reflect on new ideas, skills, and attitudes.
6. **Respect for learners as decision makers**: Adult learners are decision makers and need to decide for themselves what occurs for them in a learning event.
7. **Ideas, feelings, and actions**: Trainers should incorporate multiple aspects of and approaches to learning, including cognitive, affective, and psychomotor.
8. **Immediacy**: Adult learners need to see the immediate usefulness or applicability of the knowledge, skills, and attitudes they are trying to acquire.
9. **Clear roles**: This involves recognizing the human equity between teacher and student.
10. **Teamwork**: Working in teams helps to create a safe environment in which team members share responsibility.
11. **Engagement**: Adult learners should actively engage and participate in their training.
12. **Accountability**: The design of the training needs to be accountable to the learners. The learners in teams are accountable to each other and to the trainer.

B.2 The Experiential Learning Cycle

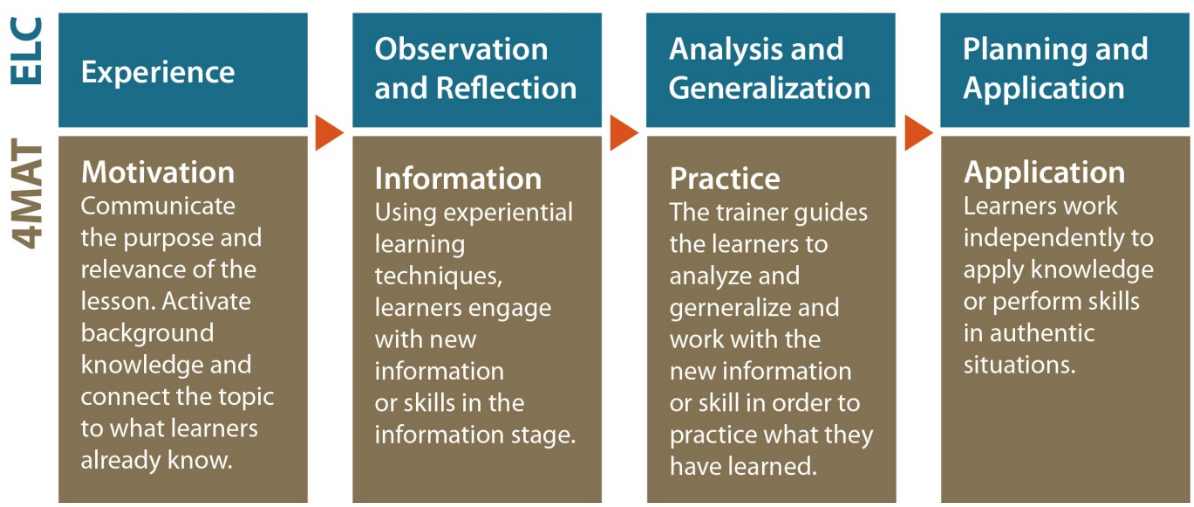
The experiential learning cycle is based on the idea that learning takes place when we reflect on our experiences and—through analysis and generalization—create new concepts, which we then test in active experimentation. Based on the work of educational theorists John Dewey, Kurt Lewin, and David Kolb, the four-stage experiential learning cycle (ELC) mirrors both naturalistic, everyday learning as well as scientific experimentation. The ELC has four phases: concrete experience; reflective observation; analysis and generalization; and planning and application. In the first phase—concrete experience—learners participate actively in an experience. This first stage can either take place before the training session or in the classroom. Learners are then guided to reflect on the experience and to articulate in detail what happened. Having described the experience, learners are asked in the third stage to analyze and generalize on the basis of their reflective observations and to develop new abstract concepts. In the final stage, learners make plans to apply and experiment with their new concepts and theories.

B.3 The 4MAT Framework



Whereas the ELC is a theory of learning, the 4MAT framework is a template for designing session plans. The 4MAT framework was developed by educator and author, Bernice McCarthy, and has four stages that align with the stages of the experiential learning cycle: motivation, information, practice, and application.

In the motivation stage of a session, trainers communicate the purpose and relevance of the lesson, and learners activate background knowledge to connect the topic to what they already know. Using experiential learning techniques in the next stage, learners then engage with new information or skills. In the third stage—practice—the trainer guides learners to analyze, generalize, and work with the new information or skills to practice what they have learned. In the final stage—application—learners work independently to apply knowledge or perform skills in real-life situations. The graphic below shows how the stages of the ELC relate to the stages of 4MAT.

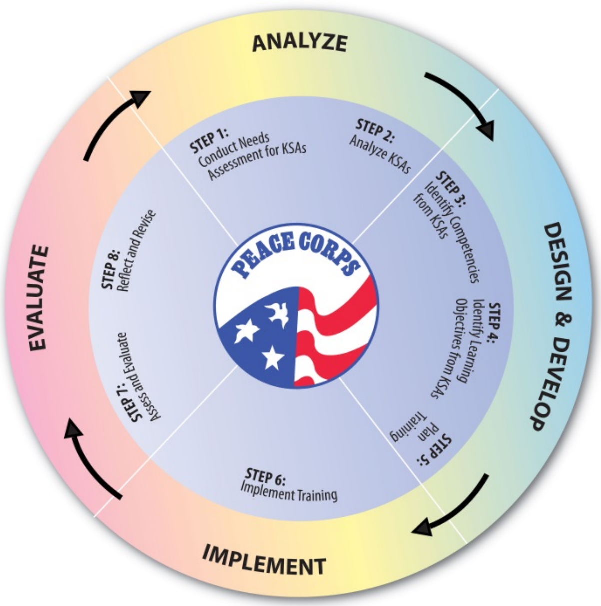


Although all Peace Corps training should be guided by adult learning principles, the ELC, and 4MAT, it is important to note that these should be considered guiding frameworks rather than strict rules for training. There is considerable flexibility within this approach. For instance, Msomeany training sessions, for example, might benefit from more than one information or practice stage, while some policy sessions are not readily adapted to the ELC. Similarly, language training sessions should often include a review stage at the beginning of each lesson and frequently require multiple information and practice stages. In general, however, Peace Corps training is more likely to be relevant and effective when it is guided by the adult learning principles of the ELC and 4MAT.

C. Overview of the Training Design and Evaluation (TDE) Process

High-quality training is essential for Volunteers to gain or refine the knowledge, skills, and attitudes they need to integrate into their communities and to work effectively with community members—work that achieves project goals. The Peace Corps Training Design and Evaluation (TDE) process is a participatory system for analyzing, designing, developing, implementing, and evaluating training. The TDE process is the agency's version of instructional systems design and is a cycle with the following eight steps.

The Training Design and Evaluation Process



1. Conduct a Needs Assessment for Knowledge, Skills, and Attitudes (KSAs)
2. Analyze KSAs
3. Identify Competencies from KSAs
4. Identify Learning Objectives from KSAs
5. Plan Training
6. Implement Training
7. Assess and Evaluate
8. Reflect and Revise

By using the TDE process, posts can identify the knowledge, skills, and attitudes necessary for effective Peace Corps service and can design training accordingly.

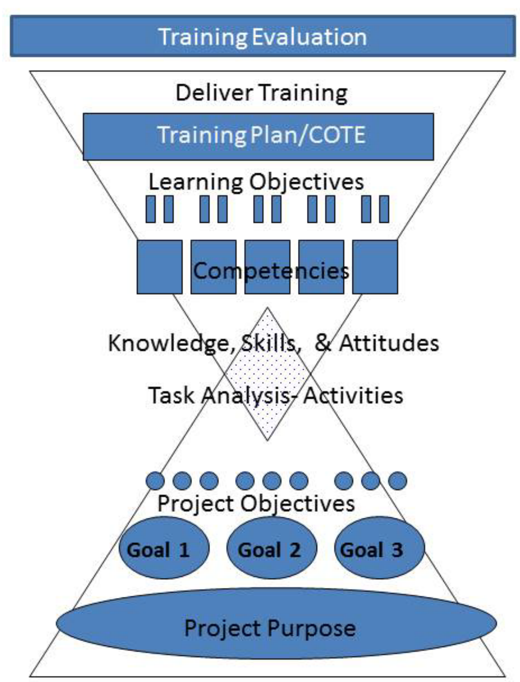
The eight steps of the process are briefly summarized below. For more detailed reading and sample resources for each step, please refer to Part 3: Training Reference Guide.

As described above in Section A.1, Global Learning Standards, Peace Corps conducted an agency-wide version of the TDE process that led to the development of global core and sector competencies and training packages. This allows posts to begin with a solid foundation in the design of their country- and sector-specific training. However, posts need to understand and apply the TDE process themselves to ensure that training is culturally and contextually appropriate. The training design process begins by referencing the project plan.

As shown in the graphic at right, the project task analysis is used in part to determine the knowledge, skills, and attitudes which are the building blocks for competencies and learning objectives. However, this is an iterative process: After training is delivered and evaluated, lessons learned should be taken into consideration when revising the project plan.

Throughout the TDE process, training on cultural and technical skills should reflect the language abilities of

Relationship between Project Design and Training Design



trainees; otherwise, they will struggle to achieve the training objectives. Post programming and language-training staff should work together to review the project plan task analysis and determine the necessary language proficiency level for each Volunteer task. Post staff should then consider the following questions:

a) Will Volunteers have the necessary language proficiency to perform each Volunteer task in the local language at the relevant point in their service?
b) If not, can they receive assistance to perform the task in the local language through:
    - Job aids such as scripts, videos, visual aids, etc.?
    - The support of a counterpart or other community member?
    - Additional language training?
c) If (a) and (b) are not possible, and language constraints will prevent Volunteers from performing the Volunteer task at the proposed point in service, can posts redesign, omit, or move the task to a later point in service when Volunteers will have the necessary language proficiency?
d) If (a), (b), and (c) are not possible, the project plan needs to be adjusted to take language proficiency into consideration.

To further clarify the TDE process, each step is described in greater detail below.

C.1 Step 1: Conduct a Needs Assessment for Knowledge, Skills, and Attitudes (KSAs)

The first step in conducting a performance needs assessment process is to identify the KSAs required to accomplish the tasks in the project plan(s). All training stakeholders should be involved in this process.

KSAs are:

- Knowledge (K): concepts, facts, and terms
- Skills (S): actions or a sequence of actions
- Attitudes (A): interests, values, feelings, and choices

Use the task analysis developed for the project plan, the Core Language Curriculum (released in September 2014), and at least two other sources to define the knowledge, skills, and attitudes that Volunteers need to be successful in their projects and communities.

The task analysis is a major link between programming and training, and it is therefore necessary for determining Volunteer learning needs and designing training. In addition to the task analysis, Volunteers also need to acquire community integration skills and KSAs related to their personal health and safety. It is also important to remember Peace Corps' First and Second Goals. These depend on Volunteers' linguistic ability to communicate effectively with host country nationals in order to help them better understand Americans, as well as to help Americans to better understand host country nationals.

Posts with more than one project should conduct and evaluate needs assessments for each project simultaneously and with both Volunteers and the programming and training team present. Identifying KSAs shared by multiple projects facilitates the writing of shared competencies, learning objectives, and session plans.

Posts identify KSAs by referring to:

- The task analyses in their project plans. For each task, stakeholders jointly identify the KSAs that are required to accomplish the project goals and objectives.
- The Core Language Curriculum. The Core Language Curriculum is a comprehensive list of the typical basic communicative tasks or skills that Volunteers need for Peace Corps service. Posts should refer to this as a checklist for language KSAs. Posts will need to adapt or add to the communicative tasks, based on their specific contexts and to address the technical aspects of

the Volunteers' service. The Core Language Curriculum also includes suggestions of intercultural communication areas that may need to be considered in writing KSAs.

- At least two other sources, such as the Volunteers themselves, partners/counterparts, host families, and RPCVs. This could be done through focus groups, interviews, or surveys. For example, asking questions such as: What KSAs do Volunteers say they need to be effective at post? What KSAs do partners/counterparts say Volunteers need to be effective at post?

When deriving KSAs from the task analysis, identify all the things the Volunteer must know and be able to do to complete a task, as well as the relevant attitudes necessary. When writing KSAs, use action verbs that are observable (e.g., identify, choose, locate, build, bargain, etc.); avoid verbs that are not observable or that are overly general (e.g., appreciate, know, be familiar with, etc.). The following table provides two examples:

The task…	**May result in KSA statements that read…**
English Literacy Project: Volunteers model letter recognition exercises with teachers.	• Explain letter recognition as a technique for developing basic reading skills (K) • Create letter recognition materials (K) • Describe letter recognition exercises (S) • Demonstrate letter recognition exercises (S) • Use letter recognition materials in modeling exercises (S) • Demonstrate respect for local colleagues' experience and professional preparation (A) • Demonstrate willingness to work within local educational context (A)
Health Project: Volunteers and partners use the case study in the *Project Community Diagnostic Survey Manual* (Page 12) as a guide to interview 20–30 families in the local language on existing hygiene attitudes and practices related to hand-washing, household water storage, household water treatment, and feces disposal.	• Complete the *Project Community Diagnostic Survey Manual* case study (K) • Work with partners to use the case study to determine basic knowledge and attitudes of caregivers related to hand-washing, household water storage, household water treatment, and feces disposal (S) • Interview 20–30 families in the local language on existing hygiene attitudes and practices related to hand-washing, household water storage, household water treatment, and feces disposal (K, S) • Demonstrate respect for local culture and facilities in relation to toilets (A)

After completing the following steps, the needs assessment for KSAs will be complete:

- Review the task analysis section from all project plans for KSAs.
- Review the Core Language Curriculum for KSAs relevant to the project(s) and adapt or add KSAs as necessary to represent the language needs of Volunteers.
- Solicit KSAs from at least two other complementary sources.
- Identify enough KSAs (approximately 300 to 500). This will allow patterns among KSAs to emerge.

For more information on developing a strong task analysis, see Part 2: Project Design and Evaluation, Section E.4, The Task Analysis.

KSA Wall Activity – Step 1: Needs Assessment for KSAs

Many posts create a 'KSA Wall' to facilitate completion of the first four steps of the TDE cycle.
For Step 1: Needs Assessment, write each of the KSAs on an individual sticky note or piece of paper and put each of them on a blank wall. This will make them easy to analyze in later steps.

Select Resources

- Part 3 Training Reference Guide
- KSAs from Roles of the Volunteer in Development, PC No. T0005

C.2 Step 2: Analyze KSAs

In this step of the TDE process, we analyze the KSAs (knowledge, skills, and attitudes) from the needs assessment phase to make sure they are specific and represent relevant knowledge, skills, and attitudes. The KSAs should be specific enough that they can be taught in a single lesson or exercise, or in a short series of lessons or exercises. Each K, S, and A should be written as a statement with an observable action verb. Avoid listing topics or behaviors that are not measurable.

For example, "understanding culture shock" might be identified as a relevant KSA. However, this needs to be broken down to more-detailed KSAs, such as "describing the adaptation process," "identifying personal coping skills," and "using appropriate coping skills in difficult situations." The verbs associated with these KSAs (describe, identify, use) can be easily observed and are more detailed and specific than "understanding culture shock." At a later point, this level of detail will be useful in designing learning activities for training.

How do we analyze KSAs?

1. Write down all of the KSAs created using each needs assessment technique and collect them in one place, such as a spreadsheet, or by using the KSA Wall Activity.
2. It can be useful to print out the list of language skills from the core curriculum, cut it up so that each language skill is on a small piece of paper, and add them to the KSA wall—either in relation to or independent of particular Volunteer tasks. As mentioned earlier, it will be necessary to adapt, add, and delete language skills.
3. Sort KSAs into those that are clear and specific and those that are too general or vague.
4. Rewrite KSAs that are vague or too general so that they are detailed, specific, and observable.
5. Sequence learning events, taking into consideration the difficulty of the concepts and tasks, so that participants master the simpler building blocks before moving on to more complicated knowledge, skills, and attitudes.

Bloom's Taxonomy (see the link below) can help posts to clarify vague KSAs. The resulting KSAs should be recorded for use in Step 3: Identify Competencies from KSAs and Step 4: Identify Learning Objectives from KSAs.

Example:

Clear and specific	**Too general or vague**
• "Define and sequence the stages of culture shock." • "Alter old eating habits to include new foods." • "Identify places where malarial mosquitoes are likely to	• "Understand…" • "Be familiar with…" • "Malaria"

breed." • "Convene community meetings in such a way that a critical mass of people will attend." • Greet and say goodbye to male and female community members of all ages in the morning, afternoon, and evening.	• "Know how to get things done here." • "Greet and take leave."

Questions to guide participants with this step's analysis include:

- Are the resulting KSAs specific enough that a trainer could design a session based on them?
- Are the KSAs specific enough that a trainee could be objectively evaluated as to whether he or she has acquired them?
- How can a Volunteer demonstrate that he or she has acquired this K, S, or A?
- What observable behaviors indicate that the Volunteer has acquired this K, S, or A?
- What simpler K, S, or A contributes to this more complex K, S, or A?

KSA Wall Activity – Step 2: Analyze KSAs

Examine and analyze each KSA on the wall using the following criteria. Rewrite any KSAs that do not meet the criteria.

- Is it clear and specific?
- Is it phrased with an action verb and observable behavior?
- Can this be taught in a single learning event or a short series of events?

Select Resources

- Part 3: Training Reference Guide
- Bloom's Taxonomy

C.3 Step 3: Identify Competencies from KSAs

The Peace Corps defines a competency as a cluster or group of knowledge, skills, and attitudes (KSAs) that enable a Volunteer to perform inter-related tasks in service of a major work function. For example, Volunteers need to know KSAs such as the local language, local customs, common courtesies, how to greet people correctly, how to dress appropriately, how to eat with others, etc. in order to integrate into their host country communities. In this case, the competency is stated simply as "integrate into the community." Competencies always begin with an action word and end with a description of an overarching, complex behavior.

After Step 2 of the TDE process, in which the KSAs are analyzed, staff will connect the groups of KSAs to competencies given in the global core, sector schematics and the Core Language Curriculum, or create new competencies that describe a particular job task unique to post. In order to identify or create competencies, related KSAs are grouped together according to common themes. This may require multiple versions of some common KSAs (such as "using local language"). Once grouped together, the KSAs can be summarized by a single statement—the competency. The global core competencies could provide a good starting point for this step.

These competencies are used throughout Volunteers' 27 months of learning and service, and they are integrated across language, intercultural, technical, safety, medical, and administrative training.

Competencies help the learner and the trainer know how the training content fits together and how learning will be applied.

The Peace Corps classifies competencies into two categories:

- *Core competencies* are those that apply to all Volunteers and trainees regardless of sector or project. These always include the three global core competencies, but posts may identify additional core competencies. Some examples are:
  - Balance cultural integration with personal well-being.
  - Include gender sensitivity in teaching and facilitating tasks.
  - Facilitate service-learning projects and foster productive, multi-level partnerships and networks.
- *Sector competencies* are those that apply only to Volunteers in a specific programmatic sector and project. Some examples of sector competencies are:
  - Strengthen business planning and administration skills.
  - Support the development of programs for youth with special needs.
  - Engage communities in health communication and promotion.

Some examples of global technical sector competencies are:

Sector	**Agriculture**	**Education**	**Environment**	**Youth Development**	**Community Economic Development**	**Health**
Sector Competencies	Improve basic agricultural practices	Facilitate gender empowerment in education	Promote increased environmental awareness and education	Prepare youth for the world of work	Promote business development	Support HIV prevention and care
	Improve household stability	Build teaching and learning capacities in English	Facilitate natural resources planning and management	Engage youth as active citizens	Support organizational strengthening	Advance community health

KSA Wall Activity – Step 3: Identify Competencies from KSAs

Begin clustering KSAs on the wall according to common themes that emerge. Some possible common themes are:

- Use local language effectively
- Understand and follow local customs
- Respect common courtesies
- Greet people correctly
- Dress appropriately

Select Resources

- [Part 3: Training Reference Guide]

C.4 Step 4: Identify Learning Objectives from KSAs

Learning objectives are written using the KSAs. Several KSAs are often combined into one learning objective. Learning objectives describe what participants will be able to do as a result of training. There are learning objectives in all of the PT&E global core and -sector training session plans. Posts can use those learning objectives or they can create their own based on the KSAs they identify in the first three steps of the TDE process. While incorporating the global core and global sector TLOs, posts must also ensure that they integrate post-defined safety, medical, and language KSAs.

The above diagram illustrates how posts can integrate the global TLOs found in the PT&E resources with their post-developed learning objectives.

When writing learning objectives, it is important to note KSAs that overlap. For example, awareness of “causes of major diseases” and “highly nutritious foods” might be relevant to both the Health sector and to the medical component of training. Similarly, a communicative task like “compare and ask and answer questions about gender roles” may be relevant to both community integration and technical sector competencies.

When designing learning objectives, staff from different components (e.g., both Health sector and medical trainers) should consider how to write learning objectives that are mutually reinforcing and sequenced appropriately, so that concepts are complementary and not redundant. There are many KSAs that overlap between the technical, language, medical, safety and security, and intercultural components of training. The process of identifying these overlaps is crucial for designing an integrated approach that avoids redundancy and uses training time as efficiently as possible.

Learning objectives have four required parts:

1. **PERFORMER:** the subject who will be learning the new knowledge, skill, or attitude.
2. **PERFORMANCE (BEHAVIOR):** the measurable or observable knowledge, skill, or attitude to be learned.
3. **CONDITION:** the condition under which the learned knowledge, skill, or attitude is observed.
4. **STANDARD:** the standard of performance, or how well the trainee demonstrates the new knowledge, skill, or attitude.

Example: The four parts are identified here:

> Using local youth camp guides and the Peace Corps manual, *Working With Youth*, trainees in small groups will write and deliver one session for a youth eco-camp using 4-MAT lesson planning.

There are two types of learning objectives—terminal learning objectives (TLOs) and enabling learning objectives. Terminal learning objectives describe complex skills and represent the culmination of multiple training activities. TLOs are used to measure the learners' success in mastering a competency. Enabling objectives are more granular and may address either knowledge alone or less complex skills. They are used to describe learners' expectations for success in a more specific training task, such as an activity during a training session. Enabling learning objectives build toward TLOs and therefore might be achieved in formal sessions or non-formal settings.

Terminal learning objective (TLO) describes a large, complex set of K's, S's, or A's that the learner will possess or be able to perform as a result of a series of training sessions and/or activities. A terminal learning objective encompasses all related enabling objectives.

Enabling learning objective describes a small, narrow set of K's, S's, or A's that the learner must complete to accomplish a terminal learning objective and perform a larger, more complex skill. All enabling learning objectives must be accomplished before the terminal objective can be met. Enabling learning objectives may be achieved through participation in formal training sessions, trainee-directed activities, or completion of homework assignments and projects. The session-learning objectives in all PT&E resource training materials are enabling learning objectives.

Graphically, the concept of terminal and enabling learning objectives can be represented like this:

Terminal learning objective: High performance – the most complex skill for each learner to master in a given competency

Enabling learning objective 3: [Skill of even higher-level complexity: apply,…]

Enabling learning objective 2: [Skill of slightly higher-level complexity: describe,…]

Enabling learning objective 1: [Knowledge or skill of low-level complexity: list,…]

KSA Wall Activity – Step 4: Identify Learning Objectives from KSAs

Create smaller clusters of K's, S's, and A's that are related or seem to go together, such as:

- Identify stages of 4MAT (K)
- Identify adult learning principles (K)
- Describe good facilitation skills (K)
- Identify stages of the experiential learning cycle (K)
- Design a session utilizing 4MAT, the ELC, and adult learning principles (S)
- Plan to incorporate strong facilitation skills and adult learning principles into the session (S)
- Value use of: 4MAT, the ELC, and adult learning principles to plan sessions (A)
- Recognize the need for sessions to include good facilitation techniques and adult learning practices (A)

These clusters should represent knowledge, skills and attitudes that can be learned within one session or a short series of sessions.

Using the cluster of related KSAs, write learning objectives for the session(s) in which participants will learn these related KSAs, such as:

1. Working in pairs, participants will identify at least three ways in which they can incorporate adult learning principles into their training or teaching at site.
2. Participants will accurately identify the stages of a concrete learning experience and relate it to the four stages of the experiential learning cycle.
3. Working collaboratively, participants will write an outline for a ten-minute mini-lesson using the 4MAT session planning framework.
4. Having identified the topic of a mini-lesson using the 4MAT framework, participants will identify three good facilitation practices they will use to teach the session.

Select Resources

- Part 3: Training Reference Guide

C.5 Step 5: Plan Training

Staff integrate learning objectives and sequence them to develop a Calendar of Training Events (COTE) for PST and throughout the 27 months of Volunteer service. Staff also make decisions about the training design and consider which learning objectives will be met during PST and which will be met through self-directed learning, tutoring, in-service training (IST), or other training events throughout service. This is particularly relevant for language training. Volunteers typically achieve only survival-level language skills by the end of PST (LPI: Intermediate). Posts need to provide structured support for continued language learning throughout service.

Posts choose appropriate methods to help Volunteers achieve learning objectives using the experiential learning cycle and the principles of adult learning to make learning realistic and meaningful. Posts draw on a wide range of Peace Corps resources to support their session design, including the training packages created by PC/Washington, often based on sessions created by posts and referred to as part of the agency's PT&E Resources. They may also develop ongoing learning strategies for Volunteers to use throughout their service. It is important to note that training budgets, staffing, and logistics are not covered in this section but in PT&E Guidance, Part 4: Management and Implementation.

Consider the following factors when sequencing learning objectives:

Importance	What KSAs are essential to teach early?
Immediacy	What do PCVs need in their early months at site, during their community-entry phase, and to complete the community-sector assessment? When will PCVs be expected to perform more complicated technical tasks?
Generalizability	Focus on KSAs with lasting benefits for a larger group of people.
Complexity	Consider the learner's ability to handle the learning task.
Timing	How much can you teach in the time available? Be mindful of the time needed for learners to process new information.
Language	Do Volunteers have the appropriate language proficiency to perform the task you are training them to do?

Once learning objectives have been developed, staff must identify the appropriate method(s) for achieving them, whether training sessions, site visits, practicum activities, or trainee-directed activities. Training staff should collaborate to ensure that, where possible, technical, medical, safety, and language training are integrated. Staff should then develop a Calendar of Training Events to determine where and when the learning activities will take place. The development of the Calendar of Training Events must be done in a collaborative way, including programming and training, safety and security, and medical staff.

Follow the second hyperlink below for a detailed description of one method for developing a training calendar at post.

Select Resources

- Part 3: Training Reference Guide, Step 5
- One-day activity to sequence learning objectives and develop a 27-month calendar of training

C.6 Step 6: Implement Training

It is in the implementation step that the trainees or Volunteers learn the KSAs they need to succeed. This step defines the interaction between learners, trainers, learning objectives, the activities and materials, and the learning environment. The implementation of training may take several forms: trainer- or peer-facilitated in-person learning; trainer-facilitated distance learning; or self-directed learning individually or in groups. Implementation of learning activities is ongoing and happens both before and throughout the Volunteer's service.

The Staff Training and Development section of the Programming, Training, and Evaluation Resources page on the Peace Corps intranet provides resources for the General Training of Trainers (GTOT) and Language Training of Trainers (LTOT), along with other relevant examples of staff and Volunteer training.

Refer to the Global Core Training Package for sessions on designing and facilitating training. In Part 4: Management and Implementation, you will also find information on:

- Staffing
- Training of trainers
- Logistics and budgeting

Select Resources

- Part 3: Training Reference Guide

C.7 Step 7: Assess and Evaluate

Assessment and evaluation are processes that tell us whether the trainees and Volunteers have learned the KSAs they need to succeed and whether our training efforts have been effective.

Evaluation Levels

The Peace Corps' assessment of Volunteer learning, as well as its evaluation of Volunteer training and the training of community members, uses a framework developed by Donald Kirkpatrick that presents four levels of evaluation. Each level successively requires more time and a greater degree of analysis. The Peace Corps aims to assess learning and inform training evaluation using at least Kirkpatrick's Level 2 "Did participants learn the KSAs?" To the extent possible, Peace Corps aims to inform training decisions based on Kirkpatrick evaluation levels three and four, both for Volunteer training and for training of community members by Volunteers.

LEVEL 1: REACTION	**Did participants like the training?**	**Example: surveys**
The first level measures how participants react to the training, including their satisfaction level, their perception of their own learning, and their perception of the quality of training.		☺ ☹ Chart for comments on how trainees felt about a session. Feedback surveys completed at the end of the session or training period.
LEVEL 2: LEARNING	**Did participants learn the KSAs?**	**Example: formal assessments**
The second level measures the amount of learning that actually took place as a result of training. It is used to track the acquisition of learning objectives. *Our agency-wide goal is to assess Volunteer learning at least at this level.*		Oral language proficiency exam. Observation rubric for technical presentation.
LEVEL 3: BEHAVIOR	**Do participants use the skills?**	**Example: site visits to observe activities**
The third level measures whether learners are using what they learned in training in their lives or work.		Volunteers with project partners conduct hygiene education activities using techniques learned. Volunteers and counterpart teachers implement classroom management techniques in class.
LEVEL 4: RESULTS	**Do participants make a difference because of what they learned?**	**Example: Standard Sector Indicators**
The fourth level asks if the new skills being used have had an impact. This fourth level often coincides with project outcome indicators.		Number of families consuming recommended daily allowances of proteins and vitamins increases.

Source: Kirkpatrick, D.L. 1994. *Evaluating Training Programs: The Four Levels*. San Francisco: Berrett-Koehler.

Learning Assessment

As discussed earlier in Section A, Peace Corps Training Standards and Resources, the Global Learning Standards (GLS) outline the agency-wide set of terminal learning objectives that must be met in training. These TLOs are assessed through defined methods and criteria. Each global core and global sector competency is evaluated based on its own terminal learning objectives (TLOs), which outline the specific knowledge, skills and attitudes that every trainee should demonstrate. These TLOs are assessed at Kirkpatrick Level 2 (did participants learn the KSAs?) using the Trainee Assessment Portfolio (TAP). Staff guidance for the Global Learning Standards and TAP can be found on the Peace Corps intranet. Learning assessment methods in the TAP include round tables, quizzes, simulations, practicum activities, language proficiency interviews, and the Readiness-to-Serve essay, interview, and presentation.

Kirkpatrick's Level 3 measures the extent to which Volunteers use the KSAs during service. Examples of Level 3 assessment include staff observations during site visits, data and stories from Volunteer Report Forms (VRFs), and reports from Volunteers' counterparts and supervisors.

Finally, Level 4 measures if the KSAs that Volunteers learned and used made a difference in the behaviors or actions of community partners. Peace Corps evaluates Level 4 by using Standard Sector Indicators (SIs), as reported in the Volunteer Report Tool (VRT), in addition to results from the Annual Volunteer Survey (AVS) and counterpart survey. For more information on indicators, see Part 2, Section D.4 , which explains the relationship between project plans, project frameworks, and SIs. Analysis of all post-level data should inform decision making for future training design as much as possible. Keep in mind that Level 4 evaluation is the most difficult level to assess, because there are many factors that contribute to the results. It is difficult to identify what changes in behavior can be attributed to training alone. The accomplishment of learning objectives and competencies needs to be viewed together with variables in the project and community to identify other factors promoting or inhibiting the desired changes.

Training Evaluation

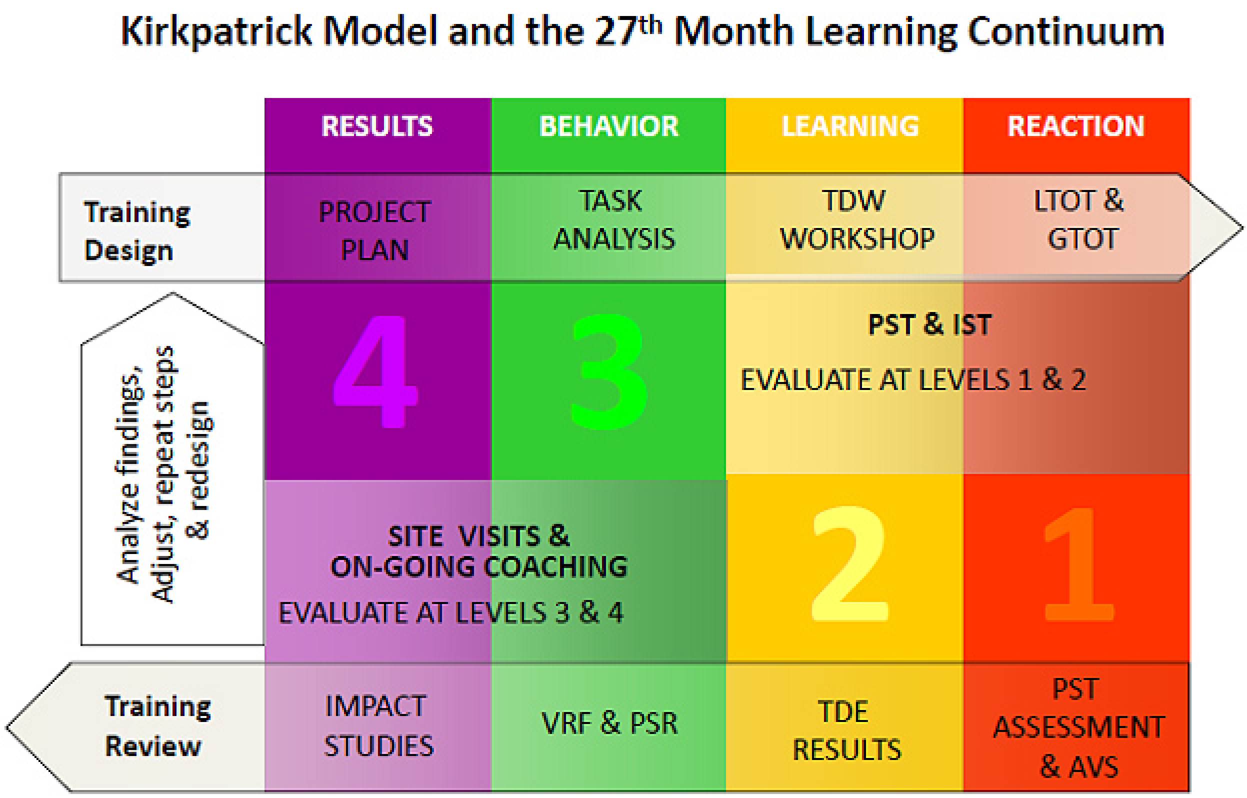
Training evaluation is a process to determine whether the training design and delivery were effective in enabling learners to acquire necessary KSAs. Information that is used to evaluate training includes:

- Data from learning assessments.
- Formal and informal feedback from learners.
- Trainer notes and observations.
- Feedback from other stakeholders (other staff members, partners, or host families).
- Data from Volunteers, counterparts, and staff on job performance.

Information used for training evaluation is gathered and recorded by trainers throughout training, but training evaluation is usually done at the end of a training program—and at a certain time after a training event. After-action reviews are meetings to review training events after the events are complete and are key activities that posts undertake as part of their training evaluation process. At these reviews, staff members reflect and debrief, primarily focusing on factors that positively or negatively affected the extent to which trainees or Volunteers acquired the learning objectives defined in the training design.

Assessment Across the Learning and Service Continuum

The following graphic illustrates how the four Kirkpatrick levels of assessment can be incorporated across the 27-month Volunteer learning/service continuum. The assessment process begins with the training design by considering: "What is the difference Peace Corps Volunteers will be able to make as a result of training?" The answer to that question comes from the sector project plans and frameworks, which should clearly state the goals and objectives for Volunteers. Level 3 evaluation is addressed in the VRFs and task analysis from the project plan. When planning training during the Training Design Workshop and TDE process, it is important to refer to the project framework and task analysis to ensure that the specific KSAs are integrated into the training plan in the form of learning objectives. Finally, during the GTOT provides the opportunity to work out how to teach the learning objectives. The logistical specifics of training are important for ensuring that the Volunteers experience the conditions they need to be able to master the learning objectives. As shown in the diagram, the four Kirkpatrick levels are reflected in the steps of the planning process.



Having integrated the levels of Kirkpatrick in the training design process, it is clear what and how to measure during the implementation phase of training. During PST and IST, it is important to determine if learners succeeded in achieving the first and second levels of Kirkpatrick. Using satisfaction surveys and the results of the Training Assessment Portfolios (TAP), analysis of the results shows how successful the training was at these levels.

After training, participants should be evaluated at Kirkpatrick Levels 3 and 4. This is accomplished during site visits and using data gathered from Volunteer Report Forms (VRFs). Since the training is designed to enable Volunteers to accomplish the goals and objectives of the project framework, the VRFs should provide a means to measure how well each Volunteer is applying what they learned on the job. Site visits provide opportunities for staff to document how well the Volunteers are demonstrating the competencies taught during PSTs and ISTs. Post staff might need to work with the training staff to develop data collection tools to focus observations and data gathering on Kirkpatrick Levels 3 and 4 during site visits. The VRF provides data on the impact Volunteers are having. If the project is achieving its goals, then the assumption is that yes, they are making a difference as intended by the training design. Other aspects of the VRF, such as the “Tell Your Story” and “Success Stories and Challenges” sections, also provide subjective information about whether Volunteers feel they are making a difference. Additionally, the training staff can use “post-defined questions” on the VRF to request feedback from Volunteers on Kirkpatrick Levels 3 and 4 during their service.

Before planning the next PST or IST training event, the Training Review Meeting is a critical step in evaluating the current training design. During this meeting, programming and training staff should use data from all four Kirkpatrick levels. This would include not only the results of the TAP and satisfaction surveys from the most recent PST, but also results from the most recent Annual Volunteer Survey (AVS), Training Status Reports, and Project Status Reports. Any challenges or promising practices highlighted in these reports should be incorporated into the review. Data from the PSR should provide a summary of the VRFs, but if post did include training-specific questions as post defined questions, the responses to these questions should also be gathered and analyzed. Finally, if post participated in a sector-specific impact study, the results of that research should also be taken into consideration.

This shows that the training review process is most effective when it includes information from a wide variety of sources that enables the programming and training team to analyze how effectively they are preparing Volunteers. Participants in the Training Review Meeting should dedicate sufficient time to gathering and digesting all of this information. Trends, highlights, successes, and challenges should all be noted and shared. A well-prepared Training Review Meeting will enable staff to ensure that the next training event is an improvement on the last.

Considerations for Successful Completion of Step 7: Assess and Evaluate

- Did you assess learning at Kirkpatrick's Level 2 for all terminal learning objectives?
- Did you hold an after-action review meeting for each training event, and did you complete a final report with recommendations?

Select Resources

- Part 3: Training Reference Guide

C.8 Step 8: Reflect and Revise

Reflecting and revising is an ongoing process. Input from stakeholders, data from assessments, and recommendations developed through training evaluations are used to develop, update, and revise the training. This may involve revising or validating competencies, rewriting learning objectives, or using new methods of instruction. It is necessary to engage in reflection in order to know how deeply each step of the TDE process must be conducted when preparing for the next training event. Once there is a firm foundation, staff should be able to revise and adjust as opposed to doing the whole process from start to finish each time. It is important to be aware of which steps need the most attention and to dedicate time for that rather than simply doing what has been done in the past.

This step involves:

1. Reflecting on the strengths and weaknesses of training (as identified by stakeholders), data from learning assessments, and any available data on Kirkpatrick Levels 3 or 4.
2. Considering which—and to what extent—TDE steps need to be revisited.
3. Proceeding to revise or redesign training.

Select Resources

- Part 3: Training Reference Guide

C.9 Guiding Principles of TDE

The following points summarize the key guiding principles of TDE:

- Training content is best when it is localized.
  Each post knows best what knowledge, skills, and attitudes (KSAs) its trainees and Volunteers need in order to be successful. While the Peace Corps aims to assist posts by providing high-

quality training resources that are consistent with good practice, posts use the TDE system to ensure that their training content is specific and contextualized to their country.

- Collaboration is essential to training design and evaluation.
  Active input from, and collaboration with, stakeholders ensures that:
  The appropriate content is included in training.
    - All trainers and learners know why the content is important and how it fits together.
    - The criteria for success are clear.
    - The proper methods for training to meet each learning objective are used.
    - Assessments and evaluations are conducted in a fair and participatory manner.
- TDE is an iterative process.
  Competencies, learning objectives, session plans, and assessment techniques evolve over time. The TDE process aims to assist staff members as they design quality learning events for Volunteers and continually improve training over time, as described in Step 8: Reflect and Revise.
- Training content is sequenced along a training continuum.
  Formal and informal training sessions and events build on one another to ensure that Volunteers develop the KSAs needed to accomplish the competencies, and to ensure that these KSAs are learned at the right time throughout the Volunteer's service. In some cases, the learning continuum may start prior to the 27-month service if Volunteers are able to access online training as invitees.

C.10 TDE Planning Resources

The following resources are training design and evaluation (TDE) action-plan forms that posts have found useful as tracking tools. It is possible to modify any of these for use at post. The purpose of these tools is to provide a structured framework to help stakeholders monitor progress toward identified implementation objectives for a post's TDE process.

Training Design and Evaluation Checklist

The summary checklist for TDE steps is a management tool to use at post to work through the TDE process for the first time. The checklist can also be used to review steps that need strengthening as posts continually improve their training systems. Training design and evaluation is an ongoing, iterative process; most posts, including start-up posts, have some form of pre-existing content already identified. Hence, posts are always engaged with one step or another of the TDE process. For example, five months prior to a pre-service training (PST), staff may be finalizing or updating one or more project plans (Step 1) and scheduling time for staff to analyze KSAs (Step 2); additionally, the post may be finalizing session plans and organizing an in-service training (IST) (Step 5) while evaluating an earlier close-of-service (COS) conference from another Volunteer group (Step 7). Staff can determine where they are in the TDE process by asking the following questions of one another.

STEP 1: Conduct a needs assessment for KSAs - start with task analysis from the project plan(s)

- ❑ Does the task analysis from the project plan form the foundation of your needs assessment?
- ❑ Did you include at least two other sources and methods to determine KSAs?

STEP 2: Analyze KSAs that PCVs need to be successful

- ❑ Are your KSAs clearly actionable (not expressed as topics or areas of study)?
- ❑ Are your KSAs relevant to the tasks in the project plan?

STEP 3: Identify competencies - cluster KSAs into core and sector competencies

- ❑ Are your core and sector competencies created through a collaborative process with representative stakeholders?
- ❑ Did you use the global core and global sector competencies to guide your identification of competencies?
- ❑ Are your core competencies related to the major functions that ALL volunteers perform?
- ❑ Are your sector competencies only related to one sector or project?
- ❑ Are KSAs needed for agency CSPPs or initiatives included in core and/or sector competencies?
- ❑ Do your competencies describe a major job function of Volunteers in the project?
- ❑ Does the competency answer, "Why do PCVs need to be able to do this?" or "The PCV needs that K, S, or A in order to…what?"

STEP 4: Identify learning objectives

- ❑ Have you identified enabling or terminal learning objectives that will incorporate all of your KSAs?
- ❑ Do all of your learning objectives that relate to the core and sector competencies contain all four required elements: 1) performer 2) performance/learned capability 3) standard 4) condition?

STEP 5: Plan training

- ❑ Did you develop your Calendar of Training Events (COTE) by first considering which KSAs need to be covered in what order (and only after that considering other factors such as staff schedules and previous norms).
- ❑ Did you choose a learning method best suited to achieve your learning objective?
- ❑ Did you design learning activities in ways that are consistent with the experiential learning cycle and with the principles of adult learning?
- ❑ Did you maximize the integration of training topics and components? For instance, did you cover several learning objectives and/or objectives from various components in a single training session?
- ❑ Did you design learning methods to build Volunteers' skills through ongoing learning?

STEP 6: Implement training

- ❑ Did you conduct and debrief learning activities in ways that are consistent with the experiential learning cycle and with the principles of adult learning?
- ❑ Did you allow enough time for the training participants to apply and reflect on what they are learning?

STEP 7: Assess and evaluate training

- ❑ Did you evaluate the training participants at Kirkpatrick Level 1 (satisfaction) for the learning objectives that are indicators of the KSAs in core and sector competencies?
- ❑ Are you using the Global Learning Standards and Trainee Assessment Portfolio as part of your Level 2 (mastery of content) assessment?

STEP 8: Reflect and revise

- ❑ Did you involve stakeholders in reflecting on the learning events and processes?
- ❑ Are you building on and revising the training system built through the TDE process rather than starting from Step One all over again?
- ❑ Are you using the data from the evaluations in Step Seven to reconsider which KSAs are most important, how your learning objectives are written, what learning methods you are using, and how you are measuring the achievement of those learning objectives?

Select Resources

- Part 3: Training Reference Guide
- TDE Overview Session Plan

D. Volunteer Learning Continuum

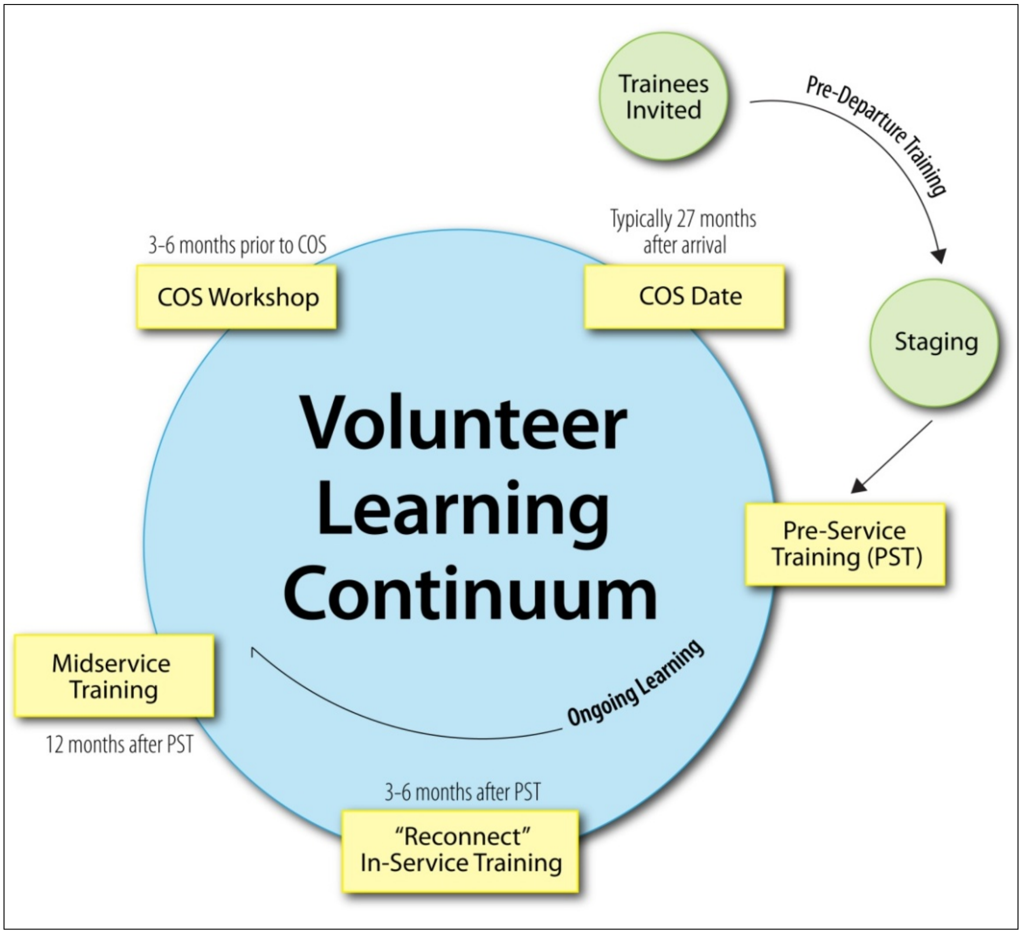
Management and support of the Volunteer training continuum is a team effort, led by the training manager, but with participation of a broad range of staff, including the country director, director of programming and training (DPT), APCD/PMs, the PCMO, the director of management and operations, the safety and security coordinator, program assistants, drivers, and, of course, the entire training staff in the preparation, logistics, and facilitation of sessions. Posts that would like to improve this team effort should refer to Part 4, Section C, Programming, Training, and Evaluation Teamwork and Communication. Volunteers and Volunteer leaders also often play a role in training, but they should not be assigned as full-time trainers; their roles should follow the Guidance on the Role of Volunteers in Training.

Preparation for a new group of trainees begins as much as 12 months prior to their arrival in-country. A brief overview of major steps involved in PST preparation (the most significant training event for incoming groups) is included in the timeline below. Along with training design (TDE) steps, selecting and preparing training sites and homestay families also require significant portions of time prior to PST (see *Host Families Matter: the Homestay Manual* (No. T0106).

Volunteer training consists of the following core training events, supplemented by additional training opportunities for Volunteers, either in technical or regional sub-groups, or individualized to meet a Volunteer’s needs.

Learning prior to trainee arrival at post takes place through:

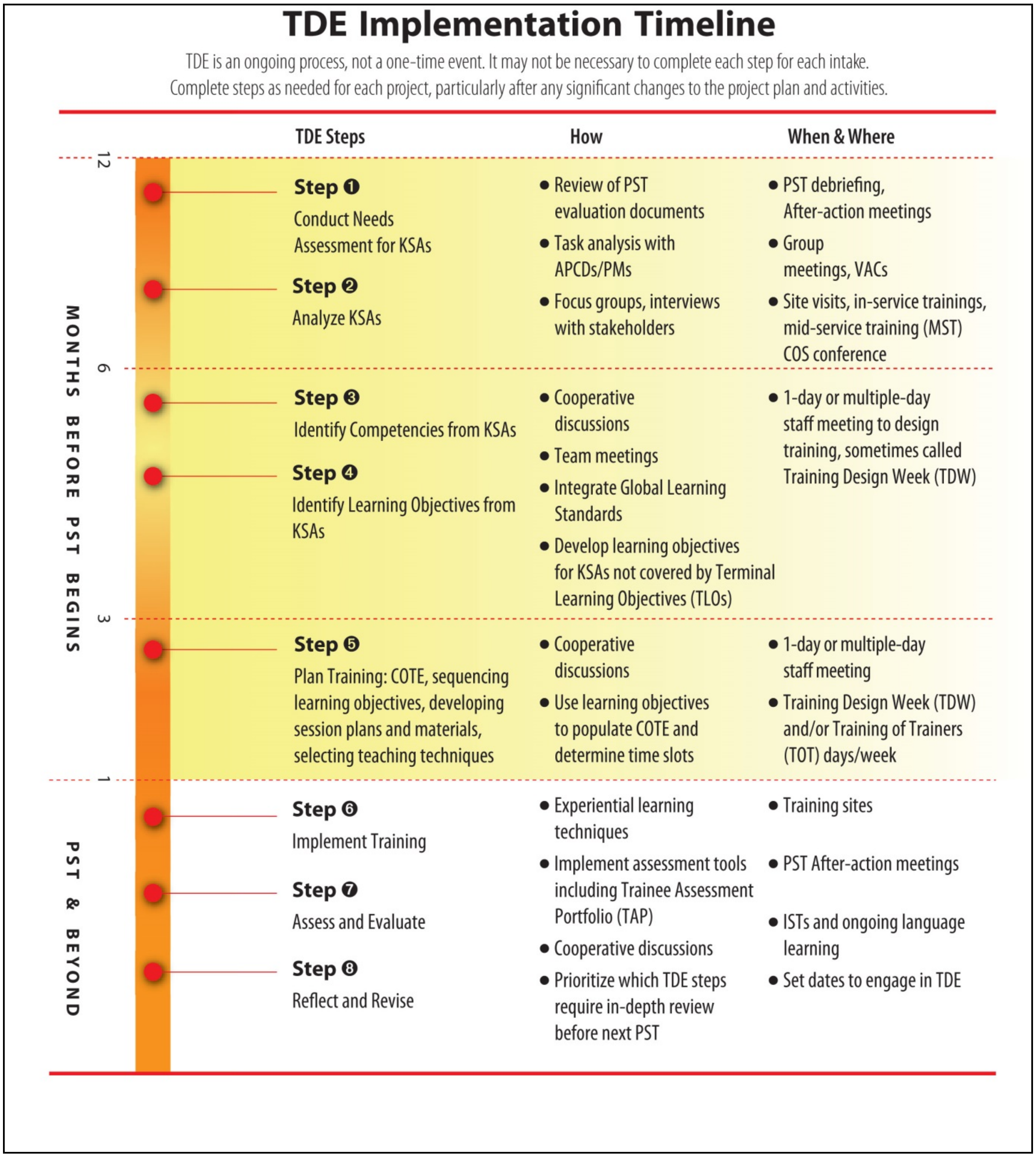
- **Pre-departure training.** Pre-departure training may include language materials provided to invitees, online learning, or formal classes that invitees enroll in to improve their skills. Core resources that invitees review in their invitation packet include the *Volunteer Handbook* (all posts) and the Volunteer assignment description (VAD), particular to each project at post.
- **Staging.** A staging event is a one-day orientation to the Peace Corps, its policies, and the general demands of being a healthy, safe, and effective Volunteer, held in the United States. It is also a time to complete the registration process.



Peace Corps Volunteer training in-country consists of the following standard training events:

- **Pre-service training (PST).** Pre-service training is the first in-country training event within the 27-month competency-based training program. Pre-service training prepares Volunteers with the knowledge, skills, and attitudes they need to effectively integrate into their communities and begin their assignments. The length of pre-service training varies but generally lasts between eight and 12 weeks. Successful training results in competence in various technical, intercultural, health, and safety and security areas as well as linguistic proficiency that meets post-defined benchmarks for each project.
- **Ongoing learning.** Volunteers address identified learning needs through self-study, formal tutoring, mentoring, e-learning, and other means. In particular, posts need to offer structured support and guidance for ongoing language learning throughout service.
- **"Reconnect" in-service training (IST).** This is an event held after Volunteers have served at their sites for three to six months. Volunteers discuss the result of their Volunteer community/sector assessment, reinforce language learning as needed, and focus on skills applicable to their work assignments.
- **Midservice conference.** Often timed in conjunction with required midservice medical examinations, the midservice conference is an occasion for Volunteers to review their first year of service, plan for their second year, and participate in sessions on requested topics. It is also an opportunity for Volunteers to receive feedback and guidance from both staff and peers, as well as to share their successes.

- **Close-of-service (COS) conference.** This important event prepares Volunteers for transitioning back to the United States and outlines contributions they will make to the agency's Third Goal—to help promote a better understanding of other peoples on the part of Americans.



E. Staff Training

E.1 Training of Trainers (TOT) for Pre-Service Training (PST)

Because pre-service training staff are often hired for only part of the year, and many are often new to the Peace Corps, many posts conduct training of trainers (TOT) workshops or have some other method to ensure that trainers are well-prepared to start PST.

Topics covered during the general training of trainers usually include:

- Application of the TDE process if a Training Design Workshop (TDW) has not been held prior to TOT;
- Training approaches and principles, the experiential learning cycle, adult learning principles, the 4MAT lesson planning framework, and facilitation skills;
- Principles of community-based training;
- Working with U.S. Americans;
- Working with Volunteers from different generations;
- Staff roles in ensuring trainee safety and security, as well as adherence to policies;
- Staff roles in the Emergency Action Plan (EAP);
- Coaching and counseling trainees and Volunteers;
- Working with communities to support training;
- Overview of the Global Learning Standards;
- Role in the Trainee Assessment Portfolio.

Topics covered during the language training of trainers (LTOT) usually include:

- Roles and responsibilities of LCFs;
- The Peace Corps approach to language training;
- Second language learning theory;
- Clarifying meaning, form, and use of new grammar or vocabulary;
- Practicing new grammar or vocabulary;
- Lesson planning;
- Teaching pronunciation;
- Other language-teaching skills;
- Practicing teaching.

The length and structure of TOT workshops vary from post to post. The majority of posts hold their TOTs immediately preceding PST. TOTs last between one and three weeks. A frequently used model includes a general TOT, followed by content-specific workshops for LCFs and technical trainers. If feasible, a longer TOT of at least two weeks will provide more valuable knowledge and skill-building for temporary PST staff. For LCFs with no previous Peace Corps experience, a minimum of 30 hours of LTOT training in addition to GTOT sessions is most beneficial. A number of resources for GTOT and LTOT are available on the Staff Training and Development intranet page.

Select Resources

- Part 3: Training Reference Guide

E.2 Training Design Workshop (TDW)

Some posts—particularly those with full-time training staff—may not hold TOTs but will hold either a Training Design Workshop (TDW) for all staff associated with training or meetings with a subset of staff to discuss technical training. During the design phase of PST, the training staff brings together programming and other Peace Corps staff, Volunteers, and work partners to develop training goals, competencies, and a calendar of sessions and activities. If needed, post can use this time to conduct a thorough Training Design and Evaluation (TDE) process. The team further focuses its discussion on TDE Step 5: Plan Training and answers questions such as the following:

- Based on the competencies and learning objectives that trainees need to meet and the skills they have, what is the content that we need to include?
- What methodologies should we use to optimize these learning opportunities?
- What kinds of sessions and activities will most efficiently and effectively support the trainees as they learn?
- Who will be responsible for covering specific competencies in sessions and activities?
- Which evaluation methods will we use to determine that trainees are ready for the first three to six months of service, and who will be responsible for them?

E.3 Language Tester Training

The Peace Corps language proficiency testing program responds to a congressional mandate stating: *"No person shall be assigned to duty as a Volunteer … in any foreign country or area unless at the time of such assignment he possesses such reasonable proficiency as his assignment requires in speaking the language of the country or area to which he is assigned."*

- Peace Corps Act 1961, also registered in the Federal Register on March 28, 1969, 22 CFR Part 305, and reflected in MS 201: Eligibility and Standards for Peace Corps Volunteer Service.

Posts use the language proficiency interview (LPI) at the end of PST to ensure that Volunteers have achieved LPI benchmarks that indicate the minimum level of proficiency needed to serve safely and effectively. Volunteers are also tested at COS and other points throughout their service to provide feedback to Volunteers on their language development, information to posts on the effectiveness of their language programs, and support for language learning after PST.

LPI testers are trained and certified through rigorous five-day tester training workshops that are scheduled every three years by the language testing specialist in Peace Corps Washington. Virtual refresher-training sessions are also available on request. LPI tester training materials are available on the Staff Training and Development intranet page.

F. Additional Resources for Trainers

F.1 Peace Corps Resources

The Peace Corps has a wealth of resources to support posts in training Volunteers during the training continuum. Many good training resources can be found on the Programming, Training, and Evaluation Resources page on the intranet. This includes global core training sessions, sector training sessions, trainee assessment resources, and staff training sessions

In addition, a few of the Peace Corps publications that are regularly used for training are:

- *Culture Matters*, No. T0087
- *The Roles of the Volunteer in Development*, No. T0005
- *Participatory Analysis for Community Action (PACA) Training Manual*, No. M0053

- *Life Skills Manual*, No. M0063
- *The New Project Design and Management Workshop Training Manual*, No. T0107
- *Volunteer Ongoing Language Learning Manual,* No. M0064
- *The Close of Service (COS) Trainer's Handbook,* No. T0007
- *Nonformal Education (NFE) Manual,* No. M0042
- *Gender and Development Training and Girls Education Manual, Booklet 3: Basic Knowledge About WID, GAD, and PACA Manual,* No. M0054

F.2 Other Resources on Training

Find links and provided descriptions for website resources from the professional education community on instructional design below. Please note that these links are for informational purposes only and do not constitute an endorsement of any kind.

- http://www.thiagi.com/
  Thiagi is a respected and creative trainer who happily and generously shares his knowledge and resources. Use this site for tips, activity ideas, podcasts, and connecting to the world of training. Many free ideas are here to make your presentations meaningful and memorable!
- http://www.globallearningpartners.com/resources/downloadable-resources/
  This is a collection of resources from Global Learning Partners, founded by Jane Vella, a guru in training design and education. While eclectic, you might just find something you need for an activity or some tips to help frame the way you train and facilitate.
- http://www.nasaga.org/
  NASAGA, The North American Simulation and Gaming Association, is the home for trainers, teachers, and educators who use active learning methods to increase engagement, enhance retention, and improve performance.
- http://bowperson.com/
  Bowperson Publishing and Training provides books (e.g., *The 10-Minute Trainer: 150 Ways to Teach it Quick & Make it Stick!*) and services for teachers, trainers, speakers, and anyone who wants to create successful and effective learning experiences. Enjoy the learning!
- http://www.nwlink.com/~donclark/hrd/sat1.html
  This website offers an introduction to instructional systems design.
- http://www.internetraining.com/ID_Consult/12eval/12eval.htm
  This site provides evaluating instruction and includes related links.
- Medina, John. 2008. *Brain Rules: 12 Principles for Surviving and Thriving at Work, Home, and School*. Seattle: Pear Press.
- Zull, James. 2002. *The Art of Changing the Brain: Enriching the Practice of Teaching by Exploring the Biology of Learning*. Sterling, VA: Stylus Publishing.

Part 4: Management & Implementation

- Planning, Budgeting, and Continual Improvement
- Programming, Training, and Evaluation Staff Development
- Programming, Training, and Evaluation Teamwork and Communication
- Site Identification and Preparation
- Supporting Trainees and Volunteers

Implementation of effective Peace Corps programming, training, and evaluation (PT&E) involves teamwork, communication, quality management systems, and a dedicated team.

A. Planning, Budgeting, and Continual Improvement

By the time a prospective Volunteer receives an invitation, the appropriate post will have already budgeted for all of his or her living, training, programming, and evaluation expenses. In addition, post staff will have developed a two-year strategic plan that prioritizes the areas they have identified for growth or continual improvement and will have already told the Office of Recruitment about the number and skill sets of Volunteers needed for the next group of Volunteers.

A.1 Agencywide Planning and Budgeting Processes

The Peace Corps staff works as a team to develop plans and budgets that meet a post's strategic priorities in support of the agency's Strategic Plan, within the constraints of the overall Peace Corps budget, and in compliance with policies and regulations. The Peace Corps uses the Integrated Planning and Budget System (IPBS) to coordinate agencywide planning and budgeting functions. Its elements are described below.

A.1.1 The FY 2014–2018 Peace Corps Strategic Plan

The Office of Strategic Information, Research, and Planning (OSIRP) leads the agency's strategic planning process. The agencywide Strategic Plan establishes three strategic goals which mirror the Peace Corps' core goals:

1. **Build Local Capacity**. Advance local development by strengthening the capacity of local communities and individuals through the service of trained Volunteers.
2. **Sharing America with the World**. Promote a better understanding of Americans through Volunteers who live and work with local communities.
3. **Bringing the World Back Home**. Increase Americans' awareness and knowledge of other cultures and global issues through Volunteers who share their Peace Corps experience and continue to serve upon their return.

In addition, there are eleven strategic objectives that constitute the roadmap for advancing the Peace Corps mission and strategic goals. These objectives serve as the primary unit of analysis for assessing how the agency is performing. These include:

1. Volunteer well-being
2. Service opportunity of choice
3. Development impact
4. Cross-cultural understanding
5. Continuation of service
6. Diversity and inclusion
7. Site development
8. Train-up
9. High-performing learning organization

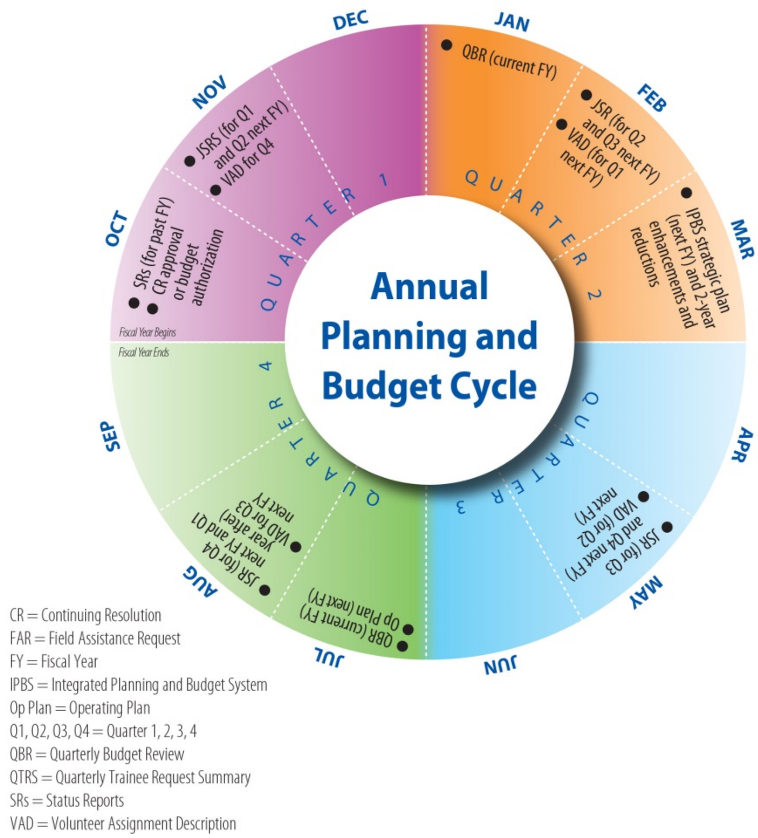
10. Global connectivity
11. Measurement for results

All posts' two-year strategic plans are developed to align with the agency's overall Strategic Plan, as well as with specific guidance provided each year.

A.1.2 Planning and Budgeting Cycle

An understanding of the Peace Corps planning and budget cycle, represented in the following figure, is important for all PT&E staff as they work as a team to manage post resources and to participate in the review and adjustment of budgets. Note that the U.S. government's fiscal year begins on October 1 and that this diagram includes planning tasks for the next year. The strategic plan exercise of the IPBS includes budgets to show the costs of post plans, as well as two-year trainee-input (TI) projections. After feedback is received on the strategic plans and other agency guidance is provided, detailed Operating Plans are finalized and submitted in late July/early August.

See the IPBS calendar on the Peace Corps intranet for specific IPBS dates for the current fiscal year, as well as for detailed information about other annual financial processes that may impact PT&E. The *Overseas Financial Management Handbook* also contains detailed guidance and policy on financial and administrative operations, which can impact PT&E operations.



A.1.3 Status Reports (SRs): November–January

Project Status Reports (PSRs), Training Status Reports (TSRs), CSPP reports, and Partnership Reports (PRs)—collectively called status reports (SRs)—offer opportunities for PT&E staff to compile the results of Volunteers' collective work and the training post provided them each fiscal year gathered through the VRT and other sources of data. There is a data call due in early November followed by an analysis period between November and January. In addition to quantitative progress, the SR analysis period also allows post staff to consider the past year's challenges, successes, lessons learned, and to develop plans to improve post projects and Volunteer training in the future. SRs feed directly into a post's strategy and budget for the following year, as do midyear budget reviews, which are used to monitor actual implementation costs of post operations and planned activities.

A.1.4 The Job Specific Requisition (JSR) and the Volunteer Assignment Description (VAD)

The Job Specific Requisition (JSR) is an electronic form that informs Volunteer Recruitment and Selection (VRS) as to the number, skills, and departure dates of trainees to recruit. See the VAD and JSR Submission Timetable or the *Trainee Request Handbook* for JSR submission due dates. **Ideally, a JSR is**

due 12 to 15 months prior to the arrival of a training class. The JSR is reviewed and approved by the regional programming and training specialist (PTS) before its submission to VRS. VRS/Placement staff may seek clarification from a post if additional dialogue is needed to ensure that VRS/Recruitment can recruit trainees as requested.

The Volunteer assignment description (VAD) is included in invitation packets and **is due to VRS/Placement approximately 11 months prior to the arrival of trainees.** It influences not only an applicant's decision to accept an assignment, but is likely to be the first significant document that shapes the expectations of prospective Volunteers about the project work.

A.1.5 Integrated Planning and Budget System (IPBS) Strategic Plan: March

The IPBS strategic plan sets forth a two-year strategic action plan for Peace Corps posts. A post usually starts this effort with a participatory process, including a retreat, led by the country director or DPT, attended by all senior staff, and with indirect input from all staff and Volunteers. The retreat is usually a one-day event, conducted toward the end of January or the beginning of February. At the retreat, programming, training, medical, and administrative staff contribute to post goals and review their alignment with the agency's Strategic Plan. Changes to trainee requests are reviewed to see if they correspond to align with the revised strategies and priorities of the post. Budgetary estimates are made for the resources needed to achieve the post's strategic objectivess. Submission deadlines are revised and published every year by the Office of Strategic Information, Research, and Planning (OSIRP) and the Office of the Chief Financial Officer (OCFO).

A.1.6 Operating Plan: July/August

The Operating Plan, or annual budget, should be consistent with the country strategy outlined in a post's IPBS strategic plan and should follow budget and trainee input ceiling marks as authorized by the Regions. While the director of management and operations (DMO) usually takes the lead in the final submission of the operating plan, the involvement of PT&E staff in budget development is essential for long-term planning. The Operating Plan includes requests for all aspects of funding for pre-service training (PST) and other training events (IST, MST, COS, etc.), meetings, program-related expenses, and all other expenses, including rental and utility costs, salaries and benefits, staff travel for Volunteer and trainee support, medical costs, and safety and security support.

A.1.7 Budget Reviews

Budgets are reviewed periodically throughout the year. Typically, the Office of Budget and Analysis (the budget office) conducts quarterly budget reviews (QBRs) in January and July with little or no input needed from posts. A more in-depth midyear review (MYR) in April/May is conducted to allow posts to explain budgetary changes that have occurred during the first half of the year.

At the end of each quarter, the the budget office updates the "V-Year Charts," which track the numbers of active PCVs and PCTs, as well as the number of COS's, ETs, swearing-ins, etc. If PCV/T numbers drop at a post, the corresponding direct costs will be removed from its budget. If PCV/T numbers increase, the corresponding funds will be added to the post's budget. This automatic adjustment ensures that posts do not have to absorb cost increases associated with an increase in PCV/T numbers, and also that funding no longer needed for direct volunteer costs is returned to the agency for redistribution. This process is referred to as the quarterly funding "push-pull."

In addition, a post can ask for adjustments to its budget due to circumstances that were not foreseen in its Integrated Planning and Budget System (IPBS) strategic plan and its operating plan. Normally, regions will ask posts to fund these new requirements with savings or reductions made somewhere else in their budget (reprogramming of their funds). If under-spending is expected, posts are requested to release money back to Peace Corps Washington for use at other posts.

A.1.8 Continuing Resolutions

A continuing resolution is a type of appropriations legislation used by the United States Congress to fund government agencies if a full appropriations bill has not been signed into law by the end of the fiscal year. During a continuing resolution, Peace Corps receives only a fraction of the budget authority it expects to receive for the year. As a result, the agency requires conservative spending during this period. The length of a continuing resolution and the funding level received during that time vary according to congressional action. Typically, the government operates under a continuing resolution throughout Quarter 1 (October through December). Whenever practical, it is best not to plan activities such as IST during the first quarter of the year to ensure that they will not be disrupted by possible spending restrictions during a continuing resolution.

Select Resources

- MS 707: Continuing Resolutions and Lapses in Funding

A.2 Funding Sources to Support Programming and Training

Peace Corps projects require a standard package of resources for project implementation, including training resources, Volunteer allowances, housing arrangements, medical services and supplies, and general equipment and supplies for staff and Volunteers. While Peace Corps funding is available for these basic costs, posts also seek partnerships with host country organizations and others to support additional items that can enhance project success. The Peace Corps has established mechanisms to assist posts and Volunteers to access resources that enhance PT&E, including: USAID partnerships such as the Small Project Assistance (SPA) program, the Global Food Security Agreement, and the Global Education Framework Agreement; grants accepted through the Peace Corps Partnership Program (PCPP); and funds available through the Peace Corps' participation in the President's Emergency Plan for AIDS Relief (PEPFAR). The Peace Corps philosophy is that every effort should be made to:

- Seek local-level funding first so that Volunteer/partner activities are built on resources available to community members—minimizing reliance on external funds and maximizing the sustainability and replicability of Volunteer efforts.
- Engage host country regional and national partners through in-kind support whenever possible.
- Draw upon nonappropriated funds only when necessary and in a way that is consistent with the Peace Corps approach to development (outlined in *The New Project and Design Workshop Training Manual* (No. T0107). Sources include both Peace Corps-managed funds and partnerships, such as SPA or PCPP, as well as external donors.

External resources can nevertheless make projects more effective if used wisely. For example, a Volunteer's work can be greatly facilitated by small funds not readily available at the local level (e.g., funding for seeds to demonstrate a gardening project). Volunteer satisfaction and effectiveness can be greatly increased by the availability of modest resources to allow projects to move to a more advanced phase more quickly. *The Small Grants Staff Handbook* provides the guidelines, materials, and resources for all of the Peace Corps' small grants programs.

The table below lists resources typically used to complement projects and training, and where these resources might come fromSee the Office of Strategic Partnerships' Global Partnerships intranet page for additional guidance and resources on using external sources of funding.

Sources of Resources Used to Enhance Programming, Training, and Evaluation

Special Resources Your Post or Project May Need	Most Likely Source	Other Possible Sources
Volunteer/Community Activity Needs		
Volunteer housing	Operating Plan	Host country partners
Staff travel	Operating Plan	USAID partnerships (SPA only for program management and MRE)
Volunteer transportation to field sites, special tools, materials	Host country partners	PEPFAR and USAID partnerships
Training for supervisors and work partners (travel, meals, and lodging)	Operating Plan For other workshops: SPA/PEPFAR; note that travel for orientation days (“counterpart days”) is allowed	Local or USAID partnerships (excluding SPA)
Tools, construction materials for pre-service training or in-service training	Operating Plan Note: include materials even when HCNs participate at IST	PEPFAR, USAID partnerships (SPA only for IST, if meets requirements)
Youth summer camp funding. Note that camps should be sponsored by a local organization.	Host country partners, SPA, PEPFAR, PCPP	PEPFAR, SPA (with restrictions), Peace Corps would not normally fund this
Technical training materials (guides) produced by others or in-country	Operating Plan	NGOs, USAID, SPA or PCPP, PEPFAR
Specialized technical training beyond PST and IST to help Volunteers meet ongoing learning objectives	Host country agencies, NGOs	PEPFAR, USAID partnerships
Very small project funds, $200 or less for Volunteers (for example, for seeds, materials)	Host country agencies, PCPP, NGOs	PEPFAR–VAST
Small project funds, $500–$6,000, for Volunteer-supported projects (for example, construction costs for latrines)	Host country agencies, GGM (PCPP), SPA, NGOs	PEPFAR–VAST

Special Resources Your Post or Project May Need	**Most Likely Source**	**Other Possible Sources**
Post- and Project-Level Needs		
Funding for Project Advisory Committee meetings (travel, hotel, meeting room, refreshments)	Operating Plan	Host country agencies, USAID agreements (SPA can cover costs for small grant committee)
Review of project by an outsider, either from your country, another country, or Washington, D.C.	Operating Plan	USAID partnerships
Regional or subregional conferences for staff	Region funding	PEPFAR, USAID partnerships
Language testers training workshops (for LPI certification)	LPI workshops occur every three years and are fully funded by OPATS. The language testing specialist in OPATS is responsible for contacting posts and scheduling the workshop.	

It is important to plan ahead, to understand the limitations and procedures for each funding mechanism, and to have backup plans as appropriate.

In order to receive funds under a partnership (often from another U.S. government organization, such as USAID), a signed agreement is required. Approval and authorization of funded program agreements is governed by the *Peace Corps Manual*, Section 103, and any related operational guidance issued by the director of intergovernmental affairs and partnerships (IGAP) pursuant to MS-103. See Section 103, Strategic Partnerships Policy and Procedures Summary for Posts (June 2012) and guidance to posts on Negotiating Agreements with USAID for additional information. The Office of Strategic Partnerships manages all partnership engagement and must therefore be engaged early in the process.

A.2.1 Host Country Partners

Community members should contribute both time and resources to support Volunteers and the projects that Volunteers help facilitate. Communities and organizations often provide support for Volunteer office space, computer use, tools, and materials. They can sometimes provide support for Volunteer housing and can also support spaces for workshops and Volunteer travel to outlying communities. Community members may also have access to low-income credit or be able to set up credit systems to support Volunteer projects. When expected to contribute to expenses, such as housing and work-related transportation costs, the host partner organization's responsibilities for these expenses should be reflected in the Volunteer placement document (i.e., the Standard Placement MOU template).

At the regional and national levels, funds may be available for workshops or infrastructure. For example, a national agency may be able to provide funds for water and sanitation infrastructure in schools.

A.2.2 Post Operating Plan

Some of the above expenses may be most appropriately funded through a post's annual budget, as prioritized in the IPBS, and consistent with funding limits provided to posts by the region. Please be aware that funds allotted to Volunteer and trainee expenses are the subject of a quarterly "push-pull" exercise. If PCT numbers drop, the corresponding funds will be removed from the post's budget. If PCT numbers increase, the corresponding funds will be added to the post's budget. This is done according to Volunteer/Year numbers maintained at the Office of Budget and Analysis in HQ in "V-Year Charts."

A.2.3 USAID Global Framework Agreements

Global framework agreements between the U.S. Agency for International Development (USAID) and the Peace Corps facilitate partnerships between the agencies on activities in specific sectors. Global framework agreements allow USAID missions (bilateral and regional) and USAID bureaus and offices to contribute funds to support activities beneficial to both Peace Corps and USAID goals.

The overarching agreement—a Participating Agency Program Agreement (PAPA)—creates a framework under which interested offices from both agencies can design innovative programs. Specific initiatives under the agreement are documented through statements of work (SOWs), which describe the activities to be undertaken, identify the anticipated results, and provide a budget for the achievement of those results. The agreements are amended on an annual basis, though they may be amended more frequently if necessary.

Each agreement identifies the program areas that its funds may support. USAID may contribute funds to any sector under the agreements, as long as they generally fall within the program description and meet the goals and objectives of both agencies. Depending on the nature of the agreement, funds may support staff costs, training, equipment, materials, community project implementation, and other appropriate costs. IGAP can support you in developing an agreement and assist in obtaining agency approval in accordance with MS 103. For more information about IGAP, see Office of Intergovernmental Affairs and Global Partnerships below. If your post is interested in pursuing a partnership with USAID, please contact IGAP early in the process to ensure following partnership procedures identified in MS 103.

There are three global framework agreements at the Peace Corps: Small Project Assistance, Global Food Security, and the Global Education Framework Agreement.

Small Project Assistance

Many countries have bilateral USAID missions that contribute funds to the Peace Corps for community activities and training through the Small Project Assistance (SPA) program. SPA is an inter-agency agreement between the Peace Corps and USAID. The agreement supports training and capacity building for host country and community partners through two primary components: (1) grant funding for small-scale community-initiated development projects, and (2) Peace Corps-organized and -implemented field assistance training aimed at building the capacity of Volunteer counterparts and work partners. Each year, Peace Corps posts that participate in the SPA program work with the local USAID mission to determine appropriate funding levels and program areas that will be supported. Funds from all contributing missions are collected annually into a single global funding amendment, which is signed by both Peace Corps Washington and USAID Washington.

While the overall SPA program is managed by staff in the Office of Strategic Partnerships, each post establishes its own post-specific review process and may set requirements appropriate to the local context (within established bounds). The post-level small grants committee reviews grant requests submitted by communities in conjunction with a Peace Corps Volunteer. The small grants committee is composed of Peace Corps staff and a USAID representative (at the discretion of the mission). It may also possibly include Volunteers and partners/counterparts.

SPA-supported training events may include project design and management workshops, technical workshops, or other activities that directly support capacity building of Volunteers' community counterparts and work partners. With the exception of PDM workshops, SPA funding cannot be used to fund basic Volunteer training costs that otherwise would be paid by the Peace Corps' appropriated budget, including PST costs, Reconnect ISTs, mid-service conferences, or COS conferences. SPA funds also may be used to support a country-level evaluation of SPA projects executed in the past. These activities are planned through the Operating Plan request process.

For more information about the SPA program, its flexibility and limitations, email SPAreports@peacecorps.gov, reference the *Small Grants Staff Handbook*, or go to the Small Grants page on the Peace Corps intranet.

A.2.4 Technical Assistance

A small pool of resources to fund technical assistance requests is usually made available as part of the annual Operating Plan process. Instructions on developing requests are distributed annually with Operating Plan guidance. While guidance for the use of these funds is reviewed annually to address the evolving needs expressed by posts, the general categories for which these funds have been used are:

- Project reviews
- Training reviews, including TDE (training design & evaluation) workshops
- Monitoring and evaluation reviews
- Training of trainers
- In-service training beyond the scope of regularly-scheduled training events
- Materials development

A.2.5 NGOs and Other Development Organizations

Posts often partner with other development organizations, complementing their strengths and resources. This sometimes takes the form of technical assistance and Volunteer participation in training with their partners/counterparts. For example, NGOs may provide free books or training on particular topics to Volunteers, and they may help to identify sites in rural areas for Volunteer assignments. Volunteers may also support and complement NGO efforts by contributing to capacity building and the sustainability of projects at the community level.

A.2.6 Office of Global Health and HIV (OGHH)

The Office of Global Health and HIV (OGHH) provides overall strategic leadership for the achievement of the goals set forth in the agency's HIV/AIDS strategy. OGHH supports the Health sector and also oversees the management of the Peace Corps' participation in the President's Emergency Plan for AIDS Relief (PEPFAR). PEPFAR began as a five-year (2003–2008), $15 billion U.S. government initiative to combat the global HIV/AIDS pandemic by supporting treatment of HIV-infected people, prevention of new infections, and care for HIV-infected individuals and AIDS orphans. In 2008, PEPFAR was reauthorized for another five years at $39 billion. The Peace Corps has been an integral part of PEPFAR since 2004, and it has leveraged PEPFAR funds for numerous PT&E enhancements, including: training (e.g., PST and IST); PEPFAR-funded Volunteers, staff, and their equipment; and small grants through the Volunteer Activity Support and Training (VAST) program. Posts request and receive PEPFAR funds alongside the Country Operating Plan or Foreign Assistance Operating Plan process in their countries. For additional information about PEPFAR, consult the "PEPFAR 101" presentation along with other guidance resources on the OGHH intranet page.

A.2.7 Office of Strategic Partnerships

The Peace Corps Office of Strategic Partnerships brokers external collaboration to support Volunteers and enhance the capacity of the agency to more effectively execute its mission. OSP includes the Office of Intergovernmental Affairs and Global Partnerships (IGAP), the Office of Gifts and Grants Management (GGM), and the Office of University and Domestic Partnerships (UDP). OSP leads the Peace Corps' engagement with the private sector, universities, foundations, multilaterals, nongovernmental organizations, and other government agencies to combine expertise, resources, and ideas to strengthen capacity and innovate. Strategic partnerships support program priorities and objectives through every stage in the Volunteer lifecycle, including recruitment, training, assignment, programming, project support, Third-Goal activities, and returned Volunteer support.

Office of Intergovernmental Affairs and Global Partnerships

IGAP promotes, develops, and manages the agency's partnerships with U.S. government agencies, international non-governmental organizations, multilateral institutions, and corporations. Strategic partnerships bring a variety of resources to the table, including placement opportunities for Volunteers, technical staff at headquarters, training resources for posts, and career opportunities for returned Volunteers.

Office of Gifts and Grants Management

The Office of Gifts and Grants Management (GGM) is part of the Office of Strategic Partnerships. The office oversees and manages the solicitation and acceptance of monetary and in-kind gifts, and it administers the Peace Corps Partnership Program (PCPP). The office engages individual donors, foundations, and corporations in support of PCPP and other agency priorities. A benefit of Volunteers' accessing PCPP funds for projects is connecting people in the United States with the communities where Volunteers work, thus contributing to the Peace Corps' Third Goal. A disadvantage is that these funds cannot be accessed without Volunteers, thus limiting replicability and sustainability, if funds are used for recurring costs. Note that all gifts must be given in compliance with MS 721: Gifts and Contributions to the Peace Corps.

Peace Corps Partnership Program (PCPP)

The Peace Corps Partnership Program, administered by GGM, is designed to assist Volunteers in obtaining financial support for approved community-based projects. PCPP does not directly fund projects, but serves as a link to groups, foundations, service organizations, and individuals wanting to contribute to the valuable work Volunteers do with their host communities. Volunteers also play a significant role in funding a project by providing specific names and contact information of family members, friends, and associates who may be interested in supporting the project they are coordinating. A community contribution of 25% or more is required for each project. Note that the time to fund a project increases with the project cost. PCPP projects should ideally be $4,000 or less. See the *Peace Corps Small Grants Staff Handbook* for more information.

A.2.8 Regions

At times, the three Peace Corps regions (Africa, EMA, and IAP) fund staff participation in overseas staff training (OST) or regional workshops for staff development. They may also fund staff exchanges. They will seek input from posts as they prioritize their limited funds for these activities.

A.3 Continual Improvement Tools

Each year, as part of their Integrated Planning and Budget System process, posts analyze results of self-assessments and Volunteer and host country partner feedback. Programming, training, and evaluation teams use a variety of tools to assess and improve the effectiveness of their systems. They analyze information and feedback provided by Volunteers, host country organizations, the respective post, and other Peace Corps staff. Similarly, the agency analyzes these results to monitor progress against agency performance indicators and to set agency priorities.

A few of the key continual improvement tools used by posts are:

- The Annual Volunteer Survey (AVS), managed by the Office of Strategic Information, Research, and Planning (OSIRP), is an anonymous survey for Volunteers.
- The Administrative Management Control System (AMCS) is a self-assessment and reporting tool that focuses on administrative, medical, and safety risk factors. This is due with the IPBS strategic plan.
- The Programming, Training, and Evaluation Standards establish the expectations for both posts and Peace Corps Washington as they work together to support high quality PT&E in the agency. These are updated annually.

In addition, posts may respond to recommendations from an external review—for example, from a sector specialist, a regional safety and security officer, or a representative of the Office of the Inspector General (OIG).

Tool		**Comments on Purpose/Use**
HCN	Host Country Impact Studies	The Office of Strategic Information, Research, and Planning (OSIRP) conducted evaluation studies to determine the impact of Volunteer service on the Peace Corps' First and Second Goals. The studies demonstrate Volunteers' ability to build local capacity through the transfer of skills to host country counterparts and community members and to highlight the changes in host country nationals' understanding of Americans after working with a Volunteer.
Volunteer	Annual Volunteer Survey (AVS); required, managed by OSIRP	The Annual Volunteer Survey collects confidential Volunteer feedback on eight areas involving training, programming, Volunteer support, and safety. Volunteers complete the survey during May–July each year; global, regional, and country results are distributed to posts in October of the same year. OSIRP prepares Volunteer survey reports and presentations on AVS results throughout the year, including comparisons of cross-year survey results.
	Volunteer Report Form and Volunteer Reporting Tool (VRF/VRT); required, managed by posts	The VRT provides information on Volunteer activities, challenges, outputs, outcomes, and impacts. Posts use this information to adjust the design and implementation of projects and training, to generate reports for partners, and to summarize information reported in the SRs. The VRT is the tool that is used to support monitoring, reporting, and evaluation (MRE). See key MRE field resources for more information.

Tool		**Comments on Purpose/Use**
Self-Assessment	Status reports (SRs); required every October	Posts use status reports to identify strengths and weaknesses in programming and training and to inform post priorities for the future. They also help posts measure progress in their projects against their Standard Sector (SIs) and Post-Defined (PDIs) Indicators. The SRs include the Project Status Reports (PSRs), Cross-Sector Programming Priorities reports, the Training Status Reports (TSR), and the Partnership Reports (PRs). Posts complete their SRs through a combination of data from the VRT and other sources of data.
	Administrative Management Control System (AMCS); required annually with IPBS	The AMCS is a self-assessment and reporting tool that focuses on risk factors: administrative, medical, and safety. It also includes limited sections on leadership, programming, and training.
	Safety and security tools; occasionally required	See the Office of Safety & Security for resources for post procedures and systems to ensure safety and security, as codified in MS 270 on the intranet. As applicable, posts should also review the status of implementation of recommendations from the last EAP and the last PCSSO visit.
	Programming, Training, and Evaluation Standards	Located with other Programming, Training, and Evaluation resources, PT&E standards are available for the current year. These outline the expectations for Peace Corps Washington as well as posts in working to maximize what Volunteers do best while providing high quality Volunteer training.
	OIG recommendations at your post or other posts	See your post files for recommendations or evaluations for your post. You may also want to review recent OIG audits and evaluations of other posts as a historical reference.
	Characteristics of a High Performing Post	This is an extensive documentation of promising practices from Peace Corps posts around the world. It includes many questions for self-reflection on opportunities to improve post management systems.

B. Programming, Training, and Evaluation Staff Development

Peace Corps systems for orientation and ongoing training of both new and more seasoned staff are primarily managed by posts. Activities to meet staff members' training needs may include participation in events organized by the post; national workshops or seminars; overseas staff training (OST); training events facilitated by a specialist invited to the post; or regional conferences. They may include one-on-one tutoring or mentoring by a fellow staff member; self-directed learning; blended learning using technology; completion of online courses; enrollment in locally offered courses; and visits with a seasoned staff member from a neighboring post. Peace Corps training resources are available both for self-directed learning and for staff-led workshops for many skill areas typically identified for staff development.

B.1 Hiring Staff

While the country director and one or two other staff members at post are hired by Peace Corps Washington and are considered U.S. direct-hire (USDH) employees, the majority of Peace Corps staff members are hired in-country, in accordance with MS 743: Procurement of Personal Services of Host Country Residents by Contract. (For additional information, see also MS 744: Personal Services Contracts with Non-Host Country Residents, and, more recently, MS 743a and MS 744a, which reflect PSCs after the Kate Puzey Act.) Posts determine their staffing needs and structure, but any additions in comparative grades or staff that result in a budget increase must be approved by a post's region, and should be justified in the post's IPBS document.

Regions have developed guidelines for staffing ratios (for example, the number of language and cross-cultural facilitators per trainee). These are distributed to posts every year with the IPBS and Operating Plan guidance.

B.1.1 Developing the Statement of Work (SOW) or Position Description (PD)

Whether hiring permanent or temporary programming, training, and evaluation staff, the first step is to budget and plan for the hiring of the staff member during IPBS and operations planning. If approved, the next step is to write a detailed statement of work (SOW) in accordance with MS 743 (including SOW elements in attachments). In the case of a contract for an organization, SOWs are included in the request for proposals (RFP). Note that the term "statement of work" is usually used for personal services contractors (PSCs) who are temporary contractors, while the term "position description" is usually used for foreign service national (FSN) staff at posts. The SOW should include the skills required for the position. SOWs for each position will vary from post to post and among regions. Contact the appropriate region for examples.

B.1.2 Staff Orientation and Training

Peace Corps systems for orientation and ongoing training of both new and more seasoned staff are primarily managed by posts. Training needs are addressed for all staff, with priority given to training needed for critical job functions. Supervisors are responsible for orienting and training new staff, with the participation of many staff members in the process. Supervisors assess training needs, establish training goals, create staff development plans, and monitor the implementation of those plans. Needs assessments, which are developed in association with performance evaluations, should guide staff development plans.

A good general overview of the Peace Corps is provided in the *Overseas Staff Orientation (OSO) Guide*, a course available on PC University, which is particularly useful for any staff new to the Peace Corps. New staff are encouraged to take this course within their first three months on the job.

Locally hired staff members begin their training in the country in which they are hired. Staff members hired by Peace Corps Washington (U.S. direct hires, or USDHs) typically begin their training in Peace Corps Washington. Well-organized transition notes and files from those who left their old positions can be helpful for new staff members. At the end of this section, you will find a link to a template to use for DPT transition notes, a staff development needs self-assessment form, and a form for tracking P&T staff progress on their development plans. Your post may find it useful to adapt one or more of these for your situation.

Activities to meet staff members' training needs can be thought of as falling along a continuum of learning, beginning from the time staff members are hired and continuing throughout a staff member's employment with the Peace Corps. These training activities may include the following:

- Staff training retreats, workshops, and seminars
- Overseas staff training (OST)
- Training events provided by a specialist invited to post
- Subregional or regional conferences
- One-on-one tutoring or mentoring by a fellow staff member
- Self-directed learning (through Peace Corps resources, books, or completion of online courses or training events)
- Enrollment in locally-offered courses
- Visits with a seasoned staff member from a neighboring post

Select Resources

- DPT Transition Template
- DPT and New Staff Entry Strategies
- Staff Development Needs Assessment Form
- Staff Development Plan Template

There are also numerous other resources available to staff that address training strategies, session plans, and other reference materials to support DPT and APCD/PM competencies. Many of these resources can be found on the Programming, Training, and Evaluation landing page on the intranet and, more specifically, in the Staff Training and Development Resources section. Topics include general training of trainers (GTOT), language training of trainers (LTOT), the *Overseas Staff Orientation Guide* and an introduction to the core expectations for staff, both available on PC University.

B.1.3 Performance Management

The Peace Corps is committed to supporting staff to perform well and to continually improve its performance by providing specific feedback and supporting opportunities for growth and development. Performance appraisals are governed by MS 743: Procurement of Personal Services of Host Country Residents by Contract. All personal service contractors (PSC) are evaluated by the country director—or another Peace Corps employee designated by the country director—during and at the completion of their in-country work. One component of the performance appraisal is the staff development plan.

Giving and Receiving Feedback Across Cultures

Feedback is a key part of effective performance management. The process of giving and receiving feedback is complicated by the diversity of the Peace Corps work force. Although some of the differences in staff members' approach to giving and receiving feedback may be based on personal preferences, many others are based on cultural preferences. These cultural preferences shape staff members' expectations of each other and should be accounted for in providing performance feedback. See Cross-Cultural Differences in Feedback for additional resources.

C. Programming, Training, and Evaluation Teamwork and Communication

Strong relationships are at the heart of our work as Peace Corps staff members. To be effective in our work, we need to work as a team. This means sharing information across projects and job functions, communicating effectively across cultures, and building trust among the staff. Because PT&E staff members are often physically separated from each other, they establish systems for communication, feedback, and coordination to ensure that programming, training, and evaluation are integrated and to maximize Volunteer effectiveness. This may involve communities of practice for training, evaluation, or even for a specific sector or initiative. It may also include remote presentations and collaboration.

C.1. Building Effective Teams

When there is strong cooperation and coordination among staff, the resulting synergy makes the whole greater than the sum of its parts. Even though one might assume that teamwork comes easily, staff members who have worked together successfully know that it requires conscious effort and ongoing attention. Use the checklist, Five R's of Effective Teams (summarized below), to analyze, reflect on, and discuss how well staff members are laying the groundwork for working together as a team.

The characteristics of an effective team can be summarized on five fingers and are further detailed in the select resources below. The five R's of team-building are:

1. Reason: Team members understand how their activities contribute to a clear vision.
2. Roles: Team members know what their roles are and are trained to perform them.
3. Rules: Systems are fair and consistent.
4. Relationships: team members trust, respect, and effectively communicate with each other.
5. Rewards: team members feel that their work is valued, fairly compensated, and they have opportunities for growth.

An example agenda and lesson plans for a staff development workshop on team-building from Mali are linked below.

Select Resources

- Characteristics of an Effective Team
- Characteristics of an Effective Team Leader
- Symptoms of Team Problems
- Mali Team Building and Staff Management Skills Workshop

C.1.2 Working Effectively Across Differences

The Peace Corps work force is multicultural, made up of employees from the United States and the host country. There is also great diversity within each of these groups. Staff and Volunteers come from diverse racial, ethnic, age, sexual orientation, religious, socioeconomic, and cultural backgrounds. This multicultural workplace environment can be challenging, and—when staff members learn how to work effectively across cultural and interpersonal differences—rewarding.

One way to improve cross-cultural communication among staff is to facilitate a session on the multicultural workplace. Staff retreats, workshops, and extended staff meetings provide opportunities to proactively address intercultural differences and develop a stronger team. The session plans linked below are designed to help teams improve intercultural communication.

Select Resources

- Multicultural Workplace Case Study Session Plan
- Intercultural Communication Session Plan for Staff
- Working with US Americans

C.1.3 Training and Programming Integration

Integration of programming, training, and evaluation refers to how PT&E staff support each other's roles throughout the life of a project. Programming drives evaluation and training, and training and evaluation inform programming. PT&E staff need to work together to build and maintain quality programming, training, and evaluation, including:

- Ensuring that project goals and objectives are feasible and obtainable given the available resources for training and the skill levels of candidates.
- Ensuring that a post requests candidates who can be trained to the needs of the project.
- Determining which site assignments will best match trainee skills, interests, and work styles.
- Ensuring that Volunteers are trained in the right skills in the right sequence, including project-specific and language skills they need for the community work they perform.
- Assessing trainee and Volunteer training to ensure that they are applying the skills they learn to their community work.

Because PT&E staff are often physically separated from each other and because their perspectives are different, opportunities for effective teamwork are occasionally lost, and training may become disconnected from programming. See the select resources below for a checklist (two versions), which can help your team develop ideas on how to better integrate PT&E and to track your progress.

Examples of programming, training, and evaluation integration activities that are sometimes overlooked at posts include:

- Trainers providing feedback to programmers on the complexity of the project framework/plan and its implications for training (answering the question, "can we train to this plan?").
- Programmers working with evaluation specialists and trainers to improve the quality of the task analysis.
- Evaluation specialists providing feedback on the project framework/plan to ensure that indicators match objectives and are not overly complex or missing critical measurement components (answering the question, "can this framework/plan be addressed by Volunteers at post?").
- Trainers participating on the Project Advisory Committee and in project reviews (particularly in the opening and debriefing meetings).
- Programmers working with evaluation specialists and trainers to determine how much learning occurred from training, whether it is being used on the job, and what impact training is having on the success of a project.
- Programmers, trainers, and evaluation specialists conducting site visits together and interacting with partners/counterparts to better understand the context of Volunteer work and to be able to address questions from the field across programming, training, and evaluation that are often raised together.

See the links below for additional scenarios that illustrate how each of these areas – programming, training, and evaluation—inform each other.

Select Resources

- Diagram Showing How Task Analysis Links Programming and Training
- How the Project Plan Influences Quality Programming, Evaluation, and Training
- Programming and Training Integration Checklist (two-page version)
- Programming and Training Integration Checklist (seven-page version)
- Scenarios that Illustrate How Training and Evaluation Informs Programming

D. Site Identification and Preparation

APCDs/PMs, along with many other post staff, work in consultation with host country and partner organizations to develop a site selection strategy. Staff members work as a team to identify and prepare safe sites that meet criteria defined by each post and each project. As stated in the *Peace Corps Manual,* Section 270: "*Each [Volunteer/trainee] V/T site should be inspected before the V/T's arrival to ensure placement in appropriate, safe, and secure housing and worksites.*" Site identification and preparation are critical to Volunteer effectiveness; however, they are two of the most challenging staff functions, as time to visit sites is limited, and site conditions may change prior to—or after—a Volunteer's arrival.

Each post establishes its own site selection criteria and processes with guidance from its region. Many posts have developed site-preparation handbooks, and all have developed forms to use in site development, including site criteria checklists, housing criteria checklists, Volunteer request forms, and site survey forms. Site-history information that is critical for future site-development consideration should be kept in site-history files. An effective site-preparation process begins one year prior to the arrival of trainees and includes: systems and criteria to help ensure the selection of quality sites; backup systems (such as opportunities for multiple partners); and the management of expectations both of trainees and of host communities.

A high-quality worksite and housing are critical for Volunteers to have a safe and successful Peace Corps experience. Volunteers can more easily thrive when their sites and homes are safe, host families and neighbors are welcoming, work assignments are well-defined, and partners and host families understand their roles. Site preparation requires a team of staff and Volunteers who follow—and periodically update—procedures established at the post that comply with MS 270: Volunteer/Trainee Safety and Security.

The process of site development includes the six steps outlined in the graphic on the following page. The focus is the first four steps of the site development process—the steps prior to Volunteers' arrival at their sites. Once the Volunteers arrive at their sites, they play an important role in further development of a site throughout their service, and particularly during their first months of service. Each region also has specific site development guidance and criteria. For more information, contact the appropriate regional programming and training support unit.

Site Development Process

	1. Identify Potential Sites	2. Prepare Sites	3. Select Sites	4. Prepare Trainees & Assign Sites	5. Further Develop Sites	6. Phase Out Sites
Timeframe	- 10-12 months before PST	- 3-9 months before PST	- 0-3 months before PST	- PST Week 1-9 (varies)	- 0-24 months of service each Volunteer	- 0-3 months prior to date last Volunteer leaves
Team Members	- APCD/PM, ministry officials, partner agency department or district level officials, PAC members, Volunteers, current project partners, staff from other development organizations, embassy regional security officer, other Peace Corps staff	- APCD/PM, PCMO, PS, PTS or PA, PCVL, neighboring Volunteers, SSM, another APCD, driver	- APCD/PM, DTP, SSM, CD, PCMO, PTS, PA, other APCDs, TM, PCVL, partner organizations	- APCD/PM, CD, DPT, TM, technical trainers, LCFs, PCMO, Volunteers involved in training, SSM, PTS, PA	- APCD/PM, PCVL, neighboring Volunteers, neighboring project partners	- APCD/PM, ministry officials, partner agency departmental or district level officials, Volunteer, PCVL
Meetings & Visits	- Initial Meetings: APCD initially meets government officials, NGOs, & community members - At midservice conference and site visits, discuss sites with Volunteers - At senior staff meeting, review site placement strategy	- Visit to site to talk with potential counterpart agency, local officials, potential host families, & other stakeholders - Visits to site to follow-up on remaining issues, homestay, & counterpart details	- Staff meeting to confirm site for all projects	- Site announcements - Counterpart/orientation day - Trainee site visits	- Site visit in first three months - Additional site visits	- Site closing visit with celebration if appropriate
Staff Tasks	- Consult Volunteers - Review past sites - Set deadline for follow-up on initial interest - Give potential sites info about Peace Corps	- Check with SSM, PCMO - Check (or Begin) site history file - Site emergency contact information in VIDA	- Site must meet all mandatory site criteria - Site must be approved by CD, PCMO, & SSM (DPT in some cases) - Inform sites if selected or not selected	- Project partner or supervisor orientation - Volunteer orientation	- Sign partner agreement - Presentation of Volunteer in community	- Communicate with host organization
Volunteer Tasks	- Propose new sites - Give feedback on existing sites - Visit potential sites	- Visit sites, meet potential families, if possible, conduct activity in potential new sites - Share experience as Volunteer with community	- Site visit to follow up on expectations and arrangements	- Trainees may be asked for input on where they prefer to be assigned - PCVLs may provide input on assignments	- Volunteer community/ sector assessment - Volunteer work with patrons - PCVL support - Maintain housing	- Volunteer documents (site report, DOS), work, accomplishments, any issues
Documents	- Volunteer Request Form - Site Development Packet - PC information packets	- Site survey (detailed info) - Site criteria (checklist) - Housing checklist		- Site information packet - Confirmation of assignment/ counterpart day invitation - Rejection letter to partners not receiving Volunteers	- Partner agreement - Site visit reports - VRFs - Update site history files as appropriate - Volunteer site notebook - Site locator form	- Documentation of site accomplishments and reason for closing

E. Supporting Trainees and Volunteers

Peace Corps service is a challenging experience, in terms of language limitations, cultural adjustments, and work challenges. In addition, Volunteers may deal with loss or crisis, all while separated from their traditional support systems. All staff and Volunteers play a role in listening to trainees and Volunteers, and in providing guidance and encouragement to them as they work through challenges. Whether or not Volunteers feel supported can make or break their service and their trust in staff. The overall goal of Volunteer support is to foster responsible, professional, emotionally resilient Volunteers. The roles that programming and training staff members play in Volunteer support are described in this section. They work as a team with other staff and Volunteers to support Volunteer resiliency as described in the document linked below.

What Is "Volunteer Resiliency"?

Volunteer resiliency refers to the individual's capacity to effectively manage the effects of cumulative stress, seek and provide support, and work in a safe and productive manner.

Select Resources

- Developing and maintaining emotional resiliency of Volunteers: A team effort at post

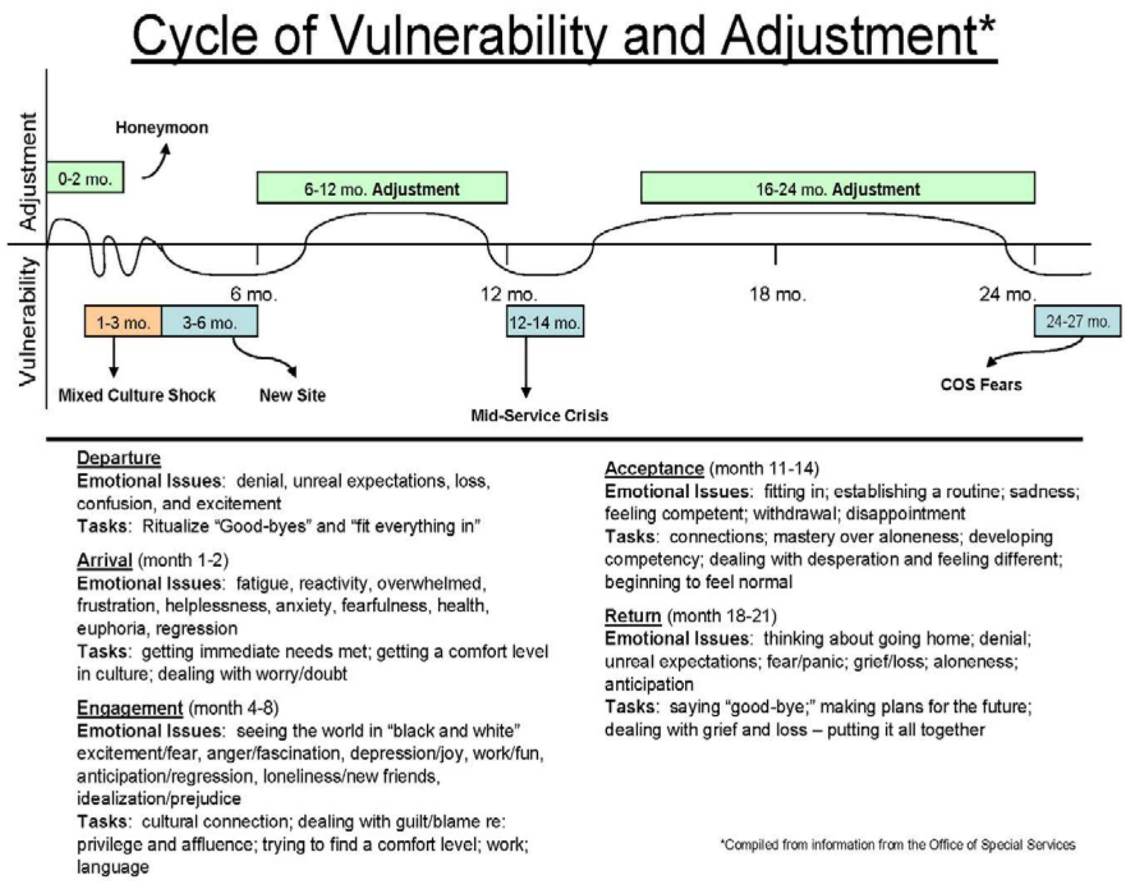
E.1 Understanding Trainee and Volunteer Hopes and Challenges

Volunteers choose to join the Peace Corps for a variety of reasons. To varying degrees, the top motivations that Volunteers express for joining the Peace Corps (see the Annual Volunteer Survey resource page for more information) include the following:

- ***Help others:*** to make a difference in the lives of those least fortunate in terms of income, education, and opportunities; to commit two years of their lives to acting on their belief in the importance of altruism, a concern for the welfare of others.
- ***Personal and professional growth:*** to learn new skills, including language skills, cross-cultural skills, and skills that may be relevant to their future careers.
- ***Travel/Adventure:*** to experience adventure and the opportunity to travel.
- ***Different culture:*** to experience living in another culture and to make connections with people in that culture.
- ***International experience:*** to gain experience living and working in another country.

The high expectations that Volunteers have of the Peace Corps motivate them throughout their training and service. However, these expectations also contribute to their frustrations with language barriers, cultural adjustments, and work challenges. Volunteers and trainees face significant emotional challenges during their service, including loss, overwhelming change, isolation, loneliness, inadequacy, and feeling unproductive.

The degree to which Volunteers and trainees can adapt will ultimately impact their ability to serve. All Volunteers will go through a personal cycle of adjustment. The cycle of vulnerability and adjustment highlighted here is based on the experience of many Volunteers and aligns with thinking in the field of cross-cultural adjustment.



However, it is critical to *not* use the cycle of vulnerability and adjustment as predictive or a basis for understanding any individual Volunteer's emotional behavior. The cycle is best used as a way to "reframe" Volunteer challenges in a nonjudgmental way. Every generation of Volunteers has had to deal with a negative generalization that has been used to explain difficult behaviors or emotions. In the '60s and '70s, discouraged Volunteers were often seen as "loose cannons and draft dodgers"; in the later '70s and '80s, they were sometimes said to be "only in the Peace Corps to pad their resumes"; and in the '90s and the first decade after 2000, some Volunteers have been labeled as "the millennium generation spoiled by instant technology." None of these generalizations help staff or posts know what to do to assist a struggling Volunteer.

Being familiar with the cycle of vulnerability and adjustment may help the staff team at post …

- **To train Volunteers to understand they are not alone,** that strong, unfamiliar feelings can be a normal part of cross-cultural adaptation, and that periodic reconnection with the group or other Volunteers should be an integral part of a strategy to help Volunteers remain emotionally resilient and productive.
- **To plan and support nonjudgmental opportunities for trainees, Volunteers, and U.S. direct-hire staff to process challenges** during typical peak periods of anxiety, anger, and depression—specifically: (a) after site visit during PST, (b) at the "reconnect" IST three to four months into service, and (c) at the mid-service conference. At these events, a facilitator trained in listening skills should conduct a group debriefing. The facilitator could be a peer-support Volunteer, DPT, U.S. PCMO, or local U.S. trainer or counselor. While trainees and Volunteers may address their

experiences outside of formal sessions, it is also important for the larger group to gather to be sure that all issues have been considered, to maximize productive discussions of options to address issues, and to ensure that staff are aware of critical issues, including sexual harassment. These sessions are most successful when led by someone with strong facilitation and cross-cultural skills, and they are usually best managed when that person is a staff member or Volunteer from the United States.

- **To support Volunteers' strategies** to avert and manage challenges that vary through their 27 months of service.
- **To consider and plan for optimal support for Volunteers at critical times**—particularly for those struggling the most with the challenges of adaptation and engaging in meaningful work—through coaching, mediation, and technical resources.

When Volunteers are unable to resolve the challenges of adaptation and finding meaningful work, they may feel lonely, isolated, miserable, and bored. They may feel anxiety, depression, sadness, and anger; and they may choose to end their service prior to completion of their 27-month commitment. Volunteers will seek human connection to calm unfamiliar, stressful states.

Understanding the "Life Cycle Model" that Joseph English developed in the early years of the Peace Corps (when Volunteers were trained in the United States) can help a post's resiliency team focus Volunteer-support efforts at critical times in Volunteers' two-year service. Joseph English noticed a pattern of peak periods of Volunteer anger from unresolved issues in the seventh and 12th months of service, which led to early termination decisions that peaked in the ninth and 15th months.

According to the FY 2010 report on early terminations, the majority of resignations happened during the first three months of service and peaked during the second and third week of pre-service training. Indeed, nearly half (44%) of all resignations that occurred during the first three months took place in the first four weeks. For the latest information on global early terminations, see the OSIRP intranet page on early termination/resignation data.

E.2 Preparing and Supporting Volunteers

E.2.1 Our Approach

The Peace Corps approach to working with trainees and Volunteer aligns with our definition of sustainable development as a process whereby people learn to build on their strengths in order to take charge of their own lives, and to address their expressed needs.

Good Volunteer and trainee support does this by viewing trainees and Volunteers with their strengths in mind and working with them to achieve successful Peace Corps service as well as their own personal aspirations. Staff are encouraged to use a situation-based approach. For example, if a trainee wants to give feedback to their host family but does not know how, staff may work with them to develop a plan to have the discussion. In a more direct approach, staff could facilitate the discussion between the trainee and family or even talk with the family themselves. Staff should lean toward a coaching approach, working with Volunteers and trainees to solve their own challenges. However, in cases of emergency or management, they should use a more direct approach. The coaching approach has four steps:

- Create a professional strength-based relationship
- Identify a topic
- Use coaching skills
- End with accountability

Volunteer support requires great skill and is developed over time.

E.2.1 Building a Strength-Based Relationship

Building an open and mutually respectful relationship with trainees and Volunteers is essential. Associate Peace Corps directors and project managers should strive to attend pre-service training in order to begin developing relationships and to have a good understanding of training policies and material. Training also provides a good opportunity to conduct interviews.

E.2.1 Training

Peace Corps staff help prepare resilient Volunteers by defining and developing pre-service and in-service training to meet learning objectives related to community integration, health, safety, security, and Peace Corps policies related to these areas. Many resources are available to posts to support training in these areas.

In 2014, the Peace Corps adopted a new Trainee Assessment Portfolio, based on three global competencies. It requires all trainees to meet global Terminal Learning Objectives (TLOs) based on the following three competencies:

- Integrate into the community
- Exemplify professional Peace Corps service
- Facilitate participatory community development

In addition to the PT&E session plans and manuals, there are numerous resources available to support these KSAs, including:

- Invitee materials, such as the *Peace Corps Volunteer Handbook* and the Volunteer assignment description (VAD).
- *A Few Minor Adjustments,* a handbook distributed to Volunteers during training to help them with the adjustment to a new country and culture. It also includes a chapter on readjusting to the United States.
- *Culture Matters (No. T0087),* a workbook to help Volunteers understand cultural values and learn how to bridge cross-cultural differences; see Chapter 6, Adjusting to a New Culture.
- *Peer Counseling Training* (Office of Health Services) is a trainer's guide for basic skills in listening, communication, counseling, and problem-solving that is valuable not only for peer supporters (members of peer support groups or any Volunteer), but also for development facilitators.
- *On the Home Front (*Counseling and Outreach Unit*)*, a handbook available in English and Spanish, distributed to the families of Volunteers about life for Volunteers while serving and upon returning to the United States.
- *Safety and Security Pre-Service Training Workbook* (Office of Safety and Security) is a workbook to accompany the PST sessions with follow-up activities.

Select Resources

- Timeline of Select Essential Resources for All Volunteers
- Peer-Counseling Training

E.2.2 Set Clear Expectations

People work better, smarter, and harder when their morale is high. A first step in building and maintaining Volunteer morale is to help the Volunteers to have realistic expectations. See the Volunteer Expectations vs. Reality 2008 Summary (linked on the OSIRP Intranet page) for information from the Annual Volunteer Survey on how Volunteer expectations matched reality. The Peace Corps and posts set expectations in materials that invitees receive, in every interaction with trainees and Volunteers, and during PST.

Core Expectations

The Core Expectations for Volunteers were developed as part of a larger effort by the Peace Corps to manage the expectations of applicants, trainees, Volunteers, staff, and host country partners. They were designed to serve as an agencywide umbrella for post-specific expectations. Subsequently, a Core Expectations Assessment Tool (CEAT) was developed to track Volunteers achievement of the Core Expectations throughout their service. For more information, link to the CEAT page on the intranet.

CORE EXPECTATIONS FOR PEACE CORPS VOLUNTEERS

1. Prepare your personal and professional life to make a commitment to serve abroad for a full term of 27 months.
2. Commit to improving the quality of life of the people with whom you live and work; and, in doing so, share your skills, adapt them, and learn new skills as needed.
3. Serve where Peace Corps asks you to go, under conditions of hardship if necessary, and with the flexibility needed for effective service.
4. Recognize that your successful and sustainable development work is based on the local trust and confidence you build by living in, and respectfully integrating yourself into, your host community and culture.
5. Recognize that you are responsible 24 hours a day, 7 days a week, for your personal conduct and professional performance.
6. Engage with host country partners in a spirit of cooperation, mutual learning, and respect.
7. Work within the rules and regulations of the Peace Corps and the local and national laws of the country where you serve.
8. Exercise judgment and personal responsibility to protect your health, safety, and well-being, and that of others.
9. Recognize that you will be perceived in your host country and community as a representative of the people, culture, values, and traditions of the United States of America.
10. Represent responsibly the people, cultures, values, and traditions of your host country and community to people in the United States, both during and following your service.

Post Volunteer Handbook

Post Volunteer handbooks, developed to include sections of the *Peace Corps Manual* relevant to Volunteers, as well as post-specific policies, are also important for setting clear expectations and communicating post and worldwide policies. It is highly recommended that *Peace Corps Manual* sections be references in post handbooks in such a way that both staff and Volunteers are aware of which policies have been set worldwide and posts can more easily verify whether worldwide policy updates have been reflected in their Volunteer handbooks.

E.3 Supporting Volunteers Throughout Their Training and Service

Volunteers feel most fulfilled:

- When they feel needed and valued.
- When they find their work meaningful and interesting.
- When they believe they are making improvements in people's lives, particularly the lives of the least fortunate.
- When they feel connected, having built relationships with other Volunteers, work partners, host family members, and supervisors. This connection is particularly important to reduce the emotional stress of loss and disconnection inherent in the Peace Corps Volunteer experience.

Therefore, the support of Volunteers through site visits, ongoing training for Volunteers, and—to the extent feasible—partners and homestay families, must focus on both the emotional and technical aspects of the Volunteer service.

Select Resources

- Chart of Training Resources to Support Volunteer Resiliency
- Training for Resiliency (No. T0138K)

E.3.1 Active Listening, Counseling, and Coaching

Staff members play an important role in counseling—providing help and support to Volunteers, creating a climate of acceptance, and assisting Volunteers to explore, understand, and act in response to problems.

Active listening is a key first step for both counseling and coaching. It serves two vital purposes:

- *To articulate and validate emotions;* too often, we make the mistake of proposing solutions when our most important role is to put ourselves in the other person's shoes and offer empathy.
- *To facilitate the identification of underlying issues*; for example, alcohol abuse is usually not the problem, but a symptom of an underlying issue.

Steps to help resolve an identified Volunteer problem:

1. Listen.
2. Respond (to the feeling and content).
3. Identify the problem and determine if it is a problem that the Volunteer or the staff needs to take the lead to resolve.
4. If the Volunteer needs to take the lead, support the Volunteer to choose the best course of action.

5. If you, the staff person, need to take the lead:
    a. Clearly state the concern.
    b. Clearly state expectations.
    c. Clearly state consequences.
6. Make a plan.
7. Follow through.

Staff members also play a role in coaching, or supporting Volunteers in a process that enables learning, development, and performance improvement. Follow the link below for tips on coaching. Also note that the training for resiliency toolkit has a section on coaching.

Select Resources

- Enhancing Natural Listening Skills
- Volunteer Support PowerPoint
- Coaching- Breakdown to Breakthrough

E.3.2 Supporting Cultural Exchange and Community Service Activities

Cultural Exchange Activities

Cultural exchange activities support Volunteers' integration, help build their need for connection in their sites, and support the Peace Corps' Second and Third Goals.

One way Volunteers can build connection and engage in meaningful activities is through the Paul D. Coverdell World Wise Schools (CWWS) correspondence match program. This program links current Volunteers with teachers and their classrooms, as well as with student groups (Boy/Girl Scouts, language clubs, etc.) in the United States. Through the exchange of letters, photographs, artwork, videos, emails, and other educational materials, U.S. students learn about other countries, cultures, and the lives of Peace Corps Volunteers.

Volunteers may also choose to publish information about their work and experiences on a blog or in an article published in the United States. Note that CWWS has a set of resources and publications to help Volunteers share their stories. Also note that MS 204, Sections 3.9–3.10, MS 543, and post's Volunteer handbook provide some guidance, for Volunteers' contact with the media.

Community Service ("Secondary") Activities

All Volunteers engage in some form of community service that is in addition to activities that support the goals and objectives of their assigned projects and activities that support the Peace Corps' Second and Third Goals. This community service supports their integration into the community, their modeling of volunteerism, and their desire to feel that they are accomplishing something even when their assigned project work is a source of frustration. However, in most cases, community service activities should be structured to occupy less than 20 percent of a Volunteers' time on an annual basis to avoid over-committing and neglecting their work assignment. Because Volunteers often look for secondary activity ideas, posts may provide resources and training for high-impact community service activities.

Select Resources

- *V^2 Volunteerism Action Guide : Multiplying the Power of Service* (No. CD062)

E.3.3 Volunteer-to-Volunteer Connection and Support

Connection with communities is vital for effective service, but many Volunteers also need to connect periodically in their native language with a peer. A post's resiliency support team should share a common vision about the extent to which peer visits are encouraged or discouraged, the policies related to them, and the flexibility with which the needs for connection of Volunteers can be met.

E.3.4 Volunteer Advisory Councils and Volunteer Leaders

One form of Volunteer leadership practiced by posts is the support of a Volunteer advisory council (VAC). VACs serve as a voice— and are also excellent resources—for suggesting solutions to Volunteer issues. See *Characteristics and Strategies of a High-Performing Post* for a further description of the functions of a VAC.

Many posts have found that Volunteer leaders (PCVLs) can play a valuable role in increasing Volunteer support, particularly with technical support and with assisting struggling Volunteers to seek out options for overcoming obstacles. Volunteer leaders can also support quality programming by supporting project development and evaluation. However, Volunteer leader positions must be developed and approved in accordance with MS 202, which requires that Volunteer leaders be assigned at least one substantive Volunteer program or activity with an assigned partner. MS 202 also requires that PCVLs do not fill staff positions, but rather assist staff. For example, Volunteer leaders and other Volunteers can assist with pre-service training, but they should not be assigned as full-time technical trainers.

E.3.5 Site Visits

The objectives of site visits:

- To support Volunteers in managing the safety, integration, and project challenges they face, and to congratulate them on their accomplishments
- To monitor and evaluate project work
- To support host families and community partners in their roles in supporting Volunteer safety, integration, cultural exchange, and work
- To gauge partner satisfaction with Volunteers

Observing Volunteers while they work provides specific information that APCDs/PMs can use to give Volunteers feedback on how to increase their effectiveness. Taking time to sit and talk one-on-one encourages Volunteers to assess their situation and identify where they need to take action or ask for assistance. The Core Expectations Training Tool (CEAT) is a great resource to use during these visits with Volunteers.

Site visits can also be helpful in these ways:

- Demonstrating appreciation for the Volunteer, host family, and partners
- Strengthening the ability of the staff member to support the Volunteer, both in terms of the relationship with the Volunteer and in terms of understanding the Volunteer's situation
- Supporting Volunteer integration; note that safety and support are based on the Volunteer building authentic, trusting relationships
- Reinforcing the role of the Peace Corps and clarifying expectations
- Identifying technical training needs for ISTs
- Continuing to build professional relationships with Volunteers and their colleagues
- Negotiation, mediation, and conflict resolution
- Building the support of decision makers, including local officials for the project and Volunteers
- Site assessment

Site visits are made not only by programming staff, but also by the CD, PCMO, SSC, training staff, and administrative staff. Visits by other staff members do not take the place of site visits from programming staff. It is critical that programming staff make the agreed-upon scheduled visits to Volunteer sites and sit down with each Volunteer alone to discuss what and how he or she is doing. Volunteers should play a role in determining how the time will be spent on the visit, and staff should communicate how the visit will go with the Volunteer prior to the visit. In some posts, Volunteers can request site visits as well as help set objectives for the visit.

Standards and Guidelines for Site Visits

Many posts have developed standards (minimum expectations) and guidelines (suggested activities) for site visits to help ensure that the time is productive and valued by Volunteers, their supervisors or community partners, and community members. Standards and guidelines are post-specific and should be developed collaboratively by programming and training staff, the SSM, the PCMO, the DMO, Volunteers, and partners. The CEAT tool can be a part of the site visit process. Post-specific standards usually include criteria for the number of visits to a site, the issues discussed, and the time spent at sites. Contact the respective programming and training units to request examples for various site visit tools and forms

Site Visit Reports

Posts approach site visit reports differently. Some find it useful to include written questions. Others divide the form into broad categories and leave it up to the APCD/PM to ask the appropriate questions and report the relevant information. Posts with projects in education often use forms during classroom observations. This facilitates feedback on lesson content and teaching skills.

For ideas on site visit reports, refer to the following:

- Honduras Site Visit Report Form

E.3.6 Setting High Expectations and Providing Feedback on Volunteer Work and Reports

Volunteers are motivated when their APCD/PM has high expectations of them and follows up on issues they face. Some examples of how APCDs/PMs can set these expectations and follow up with Volunteers include the following:

- From your first meeting, make it clear that you are proud of the work that Volunteers are doing and that Volunteers are in-country to work.
- Be responsive with emails and reports. Always respond in a timely manner to questions related to project activities.
- Ask for monthly reports on Volunteer progress on their diagnostic/community assessment assignments.
- Have Volunteers present the results of their diagnostic/community assessment assignments at the “Reconnect” IST.
- Provide feedback on the diagnostic/community assessment assignments.
- Read and provide timely feedback to Volunteer Report Forms (VRFs). Send a follow-up note or call each Volunteer who sends in a report. Comment on something that is in the Volunteer’s report.
- Share lessons learned, successes, and analysis of data (e.g., the status in meeting project goals and objectives, trends in activities, or results) from VRFs with Volunteers. Most Volunteers will make a concerted effort to complete their VRFs if they know the information is being used.

E.3.7 Technical and Other Resources

Another way staff members can support Volunteers in their work is to provide them with strong technical and project-funding information, ideas, and guidance.

Volunteer Site Information (Notebooks and Electronic Files)

Some posts ask Volunteers to keep site notebooks or electronic files that they can pass on to the Volunteer who follows them at their site. These might contain:

- Community assessment/diagnostic information.
- Contact lists.
- Names of people who are important to meet.
- Any other information that will help the next Volunteer integrate effectively into the community and become productive.

Technical Resource Books and Electronic Files

Technical resource files and books to inform Volunteers on their project activities and community service ("secondary") activities come from a number of different sources, including Volunteers, staff, and community agencies. These resources can be used in training and can be stored in the post's Information Resource Center (IRC). Letting trainees and Volunteers know about these resources and making them easily available can save Volunteers from "reinventing the wheel."

Information Resource Centers (IRCs)

Each post decides how best to collect, store, distribute, and track resource books and electronic materials. Many posts have an Information Resource Center (IRC) at the Peace Corps office. Some have regional IRCs where Volunteers at nearby sites can use and check out books without having to go into the capital. An IRC may include both Peace Corps and locally obtained books and other resources. Posts may review the Knowledge and Learning Unit of OPATS's intranet page and contact the Peace Corps librarian at KLU@peacecorps.gov for guidance in developing and managing IRCs.

Peace Corps Resources

Peace Corps has an extensive compendium of "how-to" manuals, training guides, curricula, lesson plans, and case studies published by the Peace Corps and other sources. These resources can be found on the intranet as well as on PCLive.

Post-Produced Resources

You may decide to produce technical resources for a project or post that cannot be found elsewhere or that synthesize information found elsewhere. This may be appropriate where the intention is to incorporate country-specific examples or produce a resource that can be used by partners in the local language.

If you decide you may want to produce such a resource:

1. Research existing information and contact the OPATS or OGHH sector specialist. The specialist may know of existing resources that could serve your intended purpose or help inform your resource. Review the Programming, Training, and Evaluation Resources intranet page.

2. Discuss among senior staff the resources (time and financial) needed for post publication. Volunteers and training staff may contribute to the content of the publication. Your OPATS or OGHH specialist or country desk officer may have ideas on how to finance a publication.

3. As you work on your publication, be sure that you are not violating copyright laws. See the copyright guidance and additional guidance on Peace Corps publications on the OPATS Knowledge and Learning Unit intranet pages.

If your post has developed a useful resource, please share it with your sector specialist. Your OPATS or OGHH specialist will share your resource with other posts. You may also request that your resource be published through the Peace Corps. Many Peace Corps resources are initially developed by the field.

Helping Volunteers Help Their Communities to Access Resources

In their role as development facilitators, Volunteers often help their communities access resources to meet community priorities. As mentioned in the earlier Section A.2, Funding Sources to Support Programming and Training, the Peace Corps philosophy is that, for maximum sustainability and replicability, Volunteers with partners should make every effort to help their communities: (1) seek local-level funding first; (2) seek host country regional and national support; and (3) draw upon international funds only as necessary.

If Volunteers with their partners choose to help their communities seek outside funding, note:

- Most posts advise Volunteers not to seek funding during their first three months at site. Therefore, training on learning objectives related to outside funding is usually scheduled during IST (three to four months into service), not PST.
- Volunteers helping communities to seek outside funding should always do so in a way that increases the organization's capacity to assess projects, plan projects, and to write strong grant proposals.
- As outlined in MS 204.3.7, Volunteer Code of Ethics, and 3.8, Volunteer Financial Gain, Volunteers and trainees may not accept payment for their services—except from the Peace Corps—or engage in any activity for personal financial gain within the host country.
- As outlined in MS 720.3.3, GGM is the only Peace Corps office authorized to generate support and accept donations for a partnership project. Volunteers are not authorized to accept donations on behalf of the Peace Corps. Volunteers may publicize their Peace Corps Partnership Program (PCPP) projects.
- Volunteers may help their community solicit grants or donations, but they may never directly receive the funds themselves unless it is done through the PCPP.
- Posts normally advise Volunteers to communicate with the Peace Corps whenever they are considering helping their communities seek outside funding. Peace Corps programming staff provide feedback to Volunteers on the proposed activity, and programming, training, and administrative staff may advise Volunteers on how to comply with the above-mentioned policies.

Select Resources

- MS 204: Volunteer Conduct
- MS 720: Peace Corps Partnership Program
- Peace Corps Small Grants Volunteer Handbook

E.4 Authorizing and Managing Site Changes

In some cases, a site change is an appropriate way to help a Volunteer achieve effective service. Site changes may be appropriate …

- When new safety concerns emerge in a site; these could be related to transportation, communication, crime, or threatening relationships.
- When unexpected changes or unanticipated obstacles create a situation in which Volunteer work is unproductive, despite attempts by the Volunteer and staff to resolve the obstacles.

In other cases, a change of housing, organization, or work assignment within the same site may resolve the issues. In still other cases, staff may feel that a site change is not likely to result in a positive outcome and may encourage the Volunteer to resign.

In all cases where staff members feel that a site change may be appropriate, it is important that:

- Clear criteria be used to make site-change decisions.
- The APCD/PM, PCMO, and CD be involved in the decision.
- All staff understand the rationale for the decision.
- A personal visit to the site be made by the programming staff person who was principally responsible for communicating with the host agency during site preparation. This is necessary to convey the rationale for the decision (respecting confidentiality as appropriate) to the host family and partners.

E.5 Preparing for and Managing Crises

Many Volunteers will inevitably be affected by a crisis, perhaps at their sites or elsewhere in the country. It could be a critical medical issue, a loss or critical illness of a family member, an arrest, a crime, or another type of crisis. Support for Volunteers during these times is particularly important, safeguarding a Volunteer's privacy, yet optimizing support by post staff. Posts must be sure to strike an appropriate balance between supporting Volunteers and confidentiality.

E.5.1 Loss of a Family Member in the United States

The Counseling and Outreach Unit (COU), part of the Office of Health Services (OHS), may authorize emergency leave and travel—at Peace Corps expense—for Volunteers or trainees in the event of a medical emergency of an immediate family member, as defined by MS 220 Section 6.0, Emergency Leave. When a Volunteer experiences the loss of a family member or close friend that does not qualify for emergency leave, some Volunteers choose to take leave or leave without pay, and find a way to pay for their own way home. Click on link below for ideas on how to support Volunteers who experience grief and loss when traveling home is not possible.

E.5.2 Crime

Crime victims can experience feelings of mistrust, anger, anxiety, fear, and despair. When someone is victimized overseas, these feelings may also be accompanied by confusion. When away from home, crime victims often do not fully understand their needs, surroundings, or the resources that are available to them. When Peace Corps staff respond to crimes, they can help Volunteers make sense of confusing events and provide support to address physical, psychological, legal, and financial problems.

Many victims also blame themselves and are ashamed of having been victimized. Staff should avoid contributing to those feelings. Effective victim advocates avoid victim-blaming and do not suggest that victims did something to deserve or attract a crime. Instead, the focus can be on the victim's experience and recovery. See the link to the Office of Victim Advocacy for additional resources.

The Peace Corps Office of Safety and Security has prepared a Crime Reporting and Response Training to help staff:

- To discern when to report crimes against Volunteers.
- To understand how best to support Volunteer victims of crime.
- To anticipate what assistance is available from the Office of Safety and Security.
- To prepare to respond deliberately to crime incidents.

Select Resources

- Overseas Safety and Security Topics
- Office of Victim Advocacy
- Counseling and Outreach Unit in the Office of Health Services

E.6 High-Risk Behavior, Early Termination, and Administrative Separation

Stress, anxiety, and depression in a discouraged, disconnected person may lead to high-risk behaviors as a primary coping strategy because they help relieve stress and anxiety. In an emotionally charged environment, the need for belonging may override safety.

When dealing with trainees and Volunteers who behave inappropriately, staff should aim to make the best decisions for the trainee or Volunteer and for the future of the Peace Corps in the country. Because of the sensitive nature of the risks and the likely need for disciplinary action, staff members should also be sure to always inform the CD and to document all incidents and feedback. Staff members should also be careful to strike an appropriate balance between safeguarding the trainee or Volunteer's privacy and his or her safety.

Sometimes the most appropriate course of action is to encourage a trainee or Volunteer to resign, to not swear-in a trainee, or to administratively separate a Volunteer. In most cases, these situations develop over time, during which the TM, APCD/PM, DPT, CD, and other staff may counsel the trainee or Volunteer and may give him or her written feedback on behaviors to improve for successful service.

Select Resources

- MS 284: Early Termination of Service

E.7 Lasting Romantic Relationships

Some Volunteers fall in love and face the emotional challenge of decisions about those relationships as well as the logistical challenge of obtaining a legal visa for their loved one. Peace Corps staff members do not play a role in the process to obtain a visa, but they can provide information about options and processes necessary to obtain different types of visas. It may be helpful to have one staff person be the dedicated expert on visa issues to help Volunteers with accurate information. Marriage and fiancé or fiancée visas are often cumbersome but viable; however, the challenge is significant for both those who prefer to wait until their loved one has lived in the United States prior to making a marriage decision and for homosexual couples.

Select Resources

- MS 205: Volunteer or Trainee Marriage

Overseas Programming and Training Support

The Peace Corps Office of Overseas Programming and Training Support (OPATS) develops technical resources to benefit Volunteers, their co-workers, and the larger development community.

This publication was produced by OPATS and is made available through its Knowledge & Learning Unit (KLU).

Volunteers are encouraged to submit original material to KLU@peacecorps.gov. Such material may be used in future training material, becoming part of the Peace Corps' larger contribution to development.

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