Coaching Volunteers' Performance Through Accuracy and Confidence

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Team Charter and Project Success Specification

Team Mission
During the Fall 2017 semester, our project group has been tasked with a design initiative for Komen Idaho Montana, a non-profit organization in the Idaho and Montana markets. Within the context of the assigned project, our team endeavors to achieve the following:

- Deliver analysis and design materials for 2-3 hours of performance-based training for Komen Idaho Montana in a way that is efficient and adds value to the project team and Komen Idaho Montana.
- Learn new skills: instructional design, project management, remote collaboration, technical/instructional writing, consultation, organizational intelligence, and customer service.
- Exceed personal and academic expectations for work quality while staying in scope and on schedule.
- Meet or exceed client expectations while staying within intent and outline of initial agreement.

Team Critical Success Factors (CSFs)

<table>
<thead>
<tr>
<th>Team Critical Success Factors (CSFs)</th>
<th>Indicators of Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet the academic goals of this course.</td>
<td>• On-time completion and successful grading of all assignments.</td>
</tr>
<tr>
<td></td>
<td>• Correct application of relevant concepts of instructional design.</td>
</tr>
<tr>
<td>Meet the professional expectations our team members and this course.</td>
<td>• Maintain professional, timely, and clear communication with our client.</td>
</tr>
<tr>
<td></td>
<td>• Build a professional network via internal collaboration (team) and external collaboration (client).</td>
</tr>
<tr>
<td>Fulfill and exceed OPWL instructor and client expectations with project deliverables.</td>
<td>• Project deliverables are on-time, accessible, and contain information that is useful to the client.</td>
</tr>
<tr>
<td></td>
<td>• Positive client feedback.</td>
</tr>
<tr>
<td>Maintain a functional and collaborative work environment.</td>
<td>• All group members feel valued and add value.</td>
</tr>
<tr>
<td></td>
<td>• All members are actively engaged in discussions.</td>
</tr>
<tr>
<td>Identify team member strengths and use those to function effectively as a team.</td>
<td>• Promote matching of roles that fit individual strengths.</td>
</tr>
<tr>
<td></td>
<td>• Establishing individual confidence and team trust.</td>
</tr>
<tr>
<td></td>
<td>• Learn from each other’s experience through mentorship and instruction of various concepts, technologies, and ideas.</td>
</tr>
</tbody>
</table>

Prior Experience and Lessons Learned

What worked well?

- Plan time together as a team and commit to it. When meetings get moved, the schedule will slip.
- Flexibility - although schedule is important, it is wise to account for the professional needs of all group members.
- Distinguish between client-facing activities and academic activities.
- Leverage the specific skills and experience of each team member.
- Limit the amount of time spent on unproductive discussions; if no progress is made after fair discussion, the team should escalate.
What could have been improved?

● Communication - messaging across multiple channels can leave some group members out of important conversations.
● Staying true to the division of work that was agreed upon. All efforts should be made to avoid duplicate and overlapping efforts.
● Organization and configuration management - file versions and research can be easily displaced, even with good cloud tools.
● Quality checking - attention to detail is important when compiling documents with multiple authors.
● Maintain a regular communication schedule with the client and avoid reaching out only when needed. This ensures that the client (and learners) are available when the project team needs more support.

Lessons learned for this team:

● Allow for learning curves with collaborative technologies.
● Check in with the group often, even if you cannot participate in a given meeting or discussion.
● Establish trust among team members early to limit stress in a group setting.
● Establish a specific point of contact with the client so that this important function doesn’t fall into a coordination gap.
● Work to be flexible to differences in time zones and work/life schedules, taking into consideration of working hours of all team members. Burnout is a risk if a school/work/life balance cannot be made early on and not all team members will be able to attend all sessions. Due to being in a 3-hour range in time zones, work to best accommodate schedule as allowed.

Project Management

Project Scope

Within scope: What activities and resources lie within the scope of this project?

● Conduct the analysis and design the training materials for a team of approximately twenty people that serve as race committee volunteers for Komen Idaho Montana.
● Address the specific performance gap, as established during the analysis phase and agreed upon by both the project team and the client.
● Work virtually with the client to meet communication and project expectations.
● Provide an instructional design which, when developed, will provide knowledge and skill to trainees.

Outside of scope: What activities and resources lie outside the scope of this project?

● Development and implementation of training materials beyond the detailed plan as assigned in this class.
● Working onsite for the project unless in-person presence is volunteered by group members.
● The project team is not accountable for driving motivation and engagement in the volunteer-based learner group.

Roles and Responsibilities

Division of assignment responsibilities

● To the best of our ability, we will divide the work fairly amongst all team members. One team member will be assigned as an “owner” of each assignment and he/she will be responsible for final edits and on-time submission of the work.
● Lyn Wright will make final formatting adjustments of all Phase I deliverables due to volunteering and strength of attention to detail in formatting.
• Pass 2 deliverables will be assigned a “lead” that will provide the majority of revisions and a “secondary” that will build upon changes and finalize the Pass 2 deliverable to be turned in.

• As ownership is assigned, the group will consider the following factors:
  ○ Complexity of the task or assignment.
  ○ Weight of task within project scope. High-value items may require multiple owners.
  ○ Time constraints.
  ○ Personal and professional commitments of individual team members.
  ○ Individual interest in the subject matter or the learning opportunity.
  ○ Relationship between deliverables. It may make sense for an owner of one deliverable to take lead of a second related deliverable due to the experience and flow of information.

Support for meeting assignment responsibilities

• Each team member commits to quality checking each deliverable during production and before submission as needed. Regardless of ownership, each person bears responsibility for work reviews. This quality check could include MS-Word spell check, grammar checking and overall review of the flow and content needed for each deliverable.

• Each team member commits to the project schedule and will ensure that assignments are submitted on time. Regardless of individual ownership and division of work, each person bears responsibility for on-time submission. Points lost for late assignments will be considered a group failure.

Adjusting assignment responsibilities

• If a team member is unable to meet commitments for an assignment or task, he or she can alert the team and can expect support. To maintain a collaborative environment, all team members commit to staying in communication on project deliverables.

• The team member needing support will let the team know they won’t be able to meet a deadline when they realize it won’t be met (or predict it may not be met). Via group text or email, the team will communicate to determine is a request is needed to delay the due date of the deliverable. Once agreed on, the text or email will communicate and request for this change with the course instructor.

Managing inputs and resources

• Our partnerships with our professors, lifeline, and client will be managed actively throughout the course:
  ○ We will appoint two group members as liaisons to our Komen Idaho Montana client contact. This will ensure all communications are effective and necessary.
  ○ We will appoint one team member to arrange meetings and communicate directly with leva Swanson, our ID Project Lifeline.
  ○ All team members will be copied on emails to the professor, Steve Villachica. Team members will make genuine attempts to attend all group meetings with Steve.

• The team will utilize Google for management of files. One team member will own the group folder and all team members will have access to organize and edit as needed. Separate folders will be created for each project deliverable with each Pass 1, Pass 2, and supporting documentation resources needed. Note: Initial document will be created as Google Docs and will be exported to MS word for final revisions and formatting prior to submission.

Team Roles

Although team structure will change as the project moves forward, the following formal roles have been established:

• Project Author (Josh Orr): SME for project scope.
• Client Contacts (Josh Orr, Amy Eisel): Will lead major of communication with client via email and will arrange all group meetings. Client Contacts will work with client to determine which deliverables the client wishes to review.
• Project Lifeline Contact (Lyn Wright): Will own communication with Ieva Swanson as needed and will ensure this resource is used appropriately.

• Team Coordinators (Angi Lamkins, Amy Eisel): Will set up and run group meetings, will manage the group calendar, and will ensure accessibility of group notes.

• Point Person (varies): Will review upcoming assignments, will monitor class work for best practices, and will ensure that course materials (templates) are utilized. During team meetings, team will work to communicate who will take point of various deliverables. Based on volunteering, schedules, and communication, team will work to distribute experience to all team members to serve as the point person for deliverables.

Project Coordination
Successful team project coordination will be accomplished through the following methods:

*Project deliverables are coordinated and aligned with one another.*

• The team will use shared folders in Google Drive to maintain project documents.

• Each assignment will have two versions: Draft and Final. Draft versions can be added to, commented on, and edited by any group member. The assignment owner is responsible for creating the Final version, which will be converted to MS Word before upload to assignment Wiki.

• The group will use consistent file naming protocols to ensure organization and configuration management. If a protocol change is necessary, all group members will be made aware through email, group text, or during team meetings.

*Deliverables are reviewed by the client in a way that is effective for the team and the client.*

• The client will be appropriate time to review key project deliverables. This time will be determined based on the course schedule and demands, the client’s availability, and the client’s preference to reviewing deliverables.

• As needed, the project team will revise documents to make them client-friendly and acceptable for client review. Use of ID terminology may be limited in documents intended for the client or for the volunteers.

• Although the project team will attempt to include all client feedback, the assignments must be submitted on time and will not reflect feedback received after the deadline.

*Deliverables are created and submitted in a timely manner.*

• The “owner” of each assignment is responsible for submission, but team members can and should follow up if clear attempts at timeliness are not shown within the Google shared folder.

• Client review will be factored in at the time the task is assigned.

*Each team member has “signed off” on each submitted assignment.*

• The team will implement a serial review schedule to track document cycles. The team will use the following table format:

<table>
<thead>
<tr>
<th>Document</th>
<th>Team Member</th>
<th>Deadline</th>
<th>Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Charter Draft</td>
<td>Lyn (lead writer)</td>
<td>Sept 15, 8pm</td>
<td></td>
</tr>
<tr>
<td>Team Charter Draft</td>
<td>Amy and Angi (first reviewers)</td>
<td>Sept 15, 11pm</td>
<td></td>
</tr>
<tr>
<td>Team Charter Draft</td>
<td>Josh (second reviewer)</td>
<td>Sept 16, 7am</td>
<td></td>
</tr>
<tr>
<td>Team Charter Final</td>
<td>Lyn</td>
<td>Sept 16, 11am</td>
<td>Post final version to Wiki</td>
</tr>
</tbody>
</table>
Each team member has the knowledge and skill required for each deliverable.

- Team members are encouraged to volunteer for tasks that are particularly suited to their skills and experience. This ensures that the team is working efficiently.
- Each team member is expected to use their instructional design expertise and OPWL learnings to give constructive, relevant, timely, and actionable feedback on assignments.
- If a task or assignment is beyond the scope of a team member’s expertise, he or she is expected to request help from the group. This transparency is crucial to the success of a group this size.

Communications
Team communication will occur through the following methods:

Media
- The group has agreed to use GroupMe as the primary form of daily communication. Individual group members are encouraged to call, text, and email each other as needed and follow the contact escalation plan, if needed.
- JoinMe and Zoom will be the primary tools for web meetings.
- Blackboard will be used only as assigned and required for the course. Important group communications will be made using the media above.

Procedures
- The team will meet weekly via web conference to discuss progress. More meetings will be added as important deadlines occur, and the group can revise the meeting schedule at any time.
- Email communication will be considered a group function and all members will be copied on missives to the client, the Lifeline, and to Steve.
- Formal notes or recordings will be captured for all meetings. They will be published in the shared folder under “Meetings“.

Contact Escalation Plan

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Preferred Communication Method</th>
<th>Escalation Method 1 (24 hours without contact)</th>
<th>Escalation Method 2 (48 hours without contact)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Josh Orr</td>
<td>GroupMe/Text</td>
<td>Ph: 2089493872</td>
<td>Ph: 2083860523</td>
</tr>
</tbody>
</table>
| Angi Lamkins| Text or GroupMe                | Ph: 404.509.1226
AngiLamkins@u.boisestate.edu | Ph: 404.509.1226
AngiLamkins@u.boisestate.edu |
| Amy Eisel   | GroupMe/Text: 8153556226        | amy.eisel5@gmail.com                          | Call mobile: 8153556226                        |
| Lyn Wright  | Text or GroupMe: 856.383.5594   | Email lyn.wright.nj@gmail.com                 | Call 856.383.5594                             |

If team is unable to make contact with the team members after 48 hours, the team will revise responsibilities as needed in order to continue towards completion of the deliverable. The team will communicate to determine if communication with the course instructor is necessary based on the circumstances.
Communication Quality

- Team members are expected to respond to group and individual communication in a timely manner. Based on schedules, this may be difficult, but members will work to facilitate timely and effective communication as best they can.
- Participation in group discussions should reflect adequate preparation and engagement.
- Efficiency is required for shared success, and the team will work to ensure that every team meeting has purpose and results. Meeting agendas will include the following components:
  - What is going well? What can be improved? Start/Stop/Continue – do we need to adjust our processes?
  - Status Updates: Thorough discussion of projects and timelines. Each person is expected to contribute and should participate even if they are not a current owner of a task or assignment.
  - Planning: The agenda items and important topics will be shared prior to the meeting.
  - Reflection: How are things going overall? And what are final due-outs?

Project Teaming

Team Accountability

Team accountability will be established and maintained through the following practices:

- All team members agree to be proactive, transparent, professional, and respectful about project concerns. This includes accountability concerns like work quality, timeliness, communication, and division of responsibilities.
- If we encounter a situation in which a team member is not actively participating in group success, we will attempt to resolve it internally first. The non-performing team member will be approached by another team member who takes notice of the issue. Transparent feedback is a shared responsibility of the team. The non-performing team member will be given an opportunity to ask for reasonable accommodation to help them perform better. If the issue is still unresolved, the professor will be informed in an appropriate timeframe to ensure fair evaluation. Based on the impact of the issue on the quality of learning and teamwork in the class, the team will ask for suggestions from the instructor as to what courses of action to take to mitigate the problem.

Conflict Recognition and Resolution

The team will recognize and openly acknowledge disagreement if it occurs – including these two basic types of disagreement:

- Controversy:
  - If a disagreement occurs within a group discussion or on a live document, the team agrees to abide by a voting protocol. Clear majority rules standards apply. In the event of a tie, the relevant SME will be consulted to decide the course of action. This may include the instructor, client, or life line, depending on the nature of the disagreement and the ability of the SME to assist in the decision.
  - All controversial topics will be given the courtesy of a discussion. All opinions will be heard before a decision is made.

- Conflicts of interest:
  - Conflicts of interest, which are not aligned with project purpose, are discouraged. In such cases the members involved will communicate to resolve the issue. If this is unsuccessful, the rest of the team will be brought into the communication and the team will work to resolve the issue.
Continuous Team Improvement
The team will continuously improve how it performs. The team has committed to maintaining a culture of continuous improvement that is founded on transparency and consistency. This framework will rest on the following standards:

- Feedback is both encouraged and expected. This will ensure that the team reaches individual and group learning goals, and that the work product is of a high quality. Feedback should be given on the following topics as needed:
  - Application of principles as learned in class.
  - Personal communication and conduct within the group.
  - Client interactions. If client does not offer feedback, the group will initiate it.
  - Overall work quality.
- The group will set aside time to reflect on processes as needed. Through team meetings, emails, and texts, the team will continuously work to reflect on the processes. One specific practice will be to discuss the communication and efficiency of the team after each deliverable. The team will discuss sustains and improves with the processes and communication of the deliverables.
- The group will incorporate all Pass 1 feedback into subsequent versions.

Signatures
Our digital signatures below indicate our agreement to use this team charter to deliver a successful instructional design project.

Josh Orr
Angi Lamkins
Lyn Wright
Amy Eisel
Komen Idaho Montana

Project Title
Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

About the Organization
Name: Komen Idaho Montana

Location: Komen Idaho Montana is headquartered in Boise, Idaho. This is the only official location. The target population, race committee volunteers, are located throughout Idaho and Montana.

Products/Services: Komen Idaho Montana is a regional non-profit organization that works to raise funding used to increase awareness of breast cancer symptoms, treatments, and services. Additionally, money raised assists in funding national research aimed at help to screen for, diagnose, and treat breast cancer. Komen Idaho Montana is affiliated with the national organization, Susan G. Komen, but operates independently as a non-profit organization that serves Idaho and Montana in its services.

About the Client
Name: Jodi Weak

Job Title: Executive Director of Komen Idaho Montana

Job Responsibilities: Manages all aspects of the organization. Primary job responsibilities are synonymous with those of the organization and include ensuring that everyone in Idaho and Montana has access to breast health screening. The site client also focuses on funding breast cancer research, which is done through public fundraising events like Race for the Cure.

About the Project

Who made the initial request for this training program? What was the initial request?
The initial request for this training program was made by the Executive Director and was brought to the attention of the instructor of the OPWL 537 Instructional Design courses at Boise State University in the fall of 2017. The initial request was for a job aid and role-playing (ILT) to train race committee members (volunteer staff) to answer questions related to the mission, events, research, operations, services, and grants of Komen Idaho Montana and Susan G. Komen consistently, fluently, and confidently. These questions may derive from breast cancer patients, their families, volunteers, the public, and others.

Why did this request come up? What’s going on within the organization that resulted in this request?
The client noticed a performance gap. She explained that race committee volunteers are unable to consistently, fluently, and confidently answer questions about the difference between Komen Idaho Montana and the national foundation. Whether it be answering questions about the prevention, diagnosis, and research on breast cancer or answering questions about funding and where donation money is spent, the ability to answer these questions for the public, potential donors, and other volunteers is essential to the success of the organization. The client noted that being able to accurately and confidently answer questions may be directly related to potential donors deciding to donate money to the organization. The ability to raise money to funding services and research is the mission of Komen Idaho Montana.
Why did this request come up now? What’s the history behind this request? Has something changed recently? What makes this the time for this request?

The client was interested in training due to a previously positive experience with a sponsored internship with the Boise State University Organizational Performance and Workplace Learning (OPWL) program. Additionally, the client noted that, through these observations, it was realized that Komen Idaho Montana had no structured training to provide race committee volunteers with the information and/or resources to answer questions confidently and accurately.

Team Members
Josh Orr - 2089493872 - performancecoachorr@gmail.com
Amy Eisel - 8153556226 - amy.eisel5@gmail.com
Lyn Wright - 8563835594 - lyn.wright.nj@gmail.com
Angi Lamkins - 4045091226 - angilamkins@u.boisestate.edu

Project Schedule

<table>
<thead>
<tr>
<th>Complete On or Before:</th>
<th>Item</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-13</td>
<td>Class Meeting #2: Discuss Project Descriptions and Team Charters</td>
<td>Complete</td>
</tr>
<tr>
<td>9-16</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>9-16</td>
<td><strong>Due:</strong> Project Description, Team Charter, and Project Status Review #1</td>
<td>Complete</td>
</tr>
<tr>
<td>9-17</td>
<td>Team Meeting with Instructor</td>
<td>Complete</td>
</tr>
<tr>
<td>9-19</td>
<td>Site Client Update</td>
<td>Complete</td>
</tr>
<tr>
<td>9-22</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>9-23</td>
<td><strong>Due:</strong> Performance Analysis Pass 1</td>
<td>Complete</td>
</tr>
<tr>
<td>9-27</td>
<td>Class Meeting #3: Task Analysis</td>
<td>Complete</td>
</tr>
<tr>
<td>9-27</td>
<td>Team Wellness Check with Instructor</td>
<td>Complete</td>
</tr>
<tr>
<td>9-29</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>9-30</td>
<td><strong>Due:</strong> Team Project Status Review #2 &amp; Task Analysis Pass 1</td>
<td>Complete</td>
</tr>
<tr>
<td>Date</td>
<td>Event Description</td>
<td>Status</td>
</tr>
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<td>-------</td>
<td>--------------------------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>10-1</td>
<td>Team Meeting with Instructor - NLT October 1st</td>
<td>Complete</td>
</tr>
<tr>
<td>10-4</td>
<td>Team Wellness Check with Instructor</td>
<td>Complete</td>
</tr>
<tr>
<td>10-6</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>10-7</td>
<td><strong>Due:</strong> Learner Analysis Pass 1</td>
<td>Complete</td>
</tr>
<tr>
<td>10-11</td>
<td>Team Wellness Check with Instructor</td>
<td>Complete</td>
</tr>
<tr>
<td>10-18</td>
<td>Team Wellness Check with Instructor</td>
<td>Complete</td>
</tr>
<tr>
<td>10-20</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>10-21</td>
<td><strong>Due:</strong> Objectives Pass 1</td>
<td>Complete</td>
</tr>
<tr>
<td>10-27</td>
<td>Group Meeting: Internal Team Review</td>
<td>Complete</td>
</tr>
<tr>
<td>10-27</td>
<td>Pass 2 Deliverables <strong>Due:</strong> Team Charter, Project Description</td>
<td>In-Progress</td>
</tr>
<tr>
<td>10-28</td>
<td><strong>Due:</strong> Performance Assessment Pass 1</td>
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<tr>
<td>11-8</td>
<td>Class Meeting #4: Instructional Plan Worksheet</td>
<td></td>
</tr>
<tr>
<td>11-09</td>
<td>Site Client Review</td>
<td></td>
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<tr>
<td>11-09</td>
<td>Group Meeting: Internal Team Review</td>
<td></td>
</tr>
<tr>
<td>11-11</td>
<td><strong>Due:</strong> Team Project Status Review #3, Instructional Plan Worksheet Pass 1</td>
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<tr>
<td>11-12</td>
<td>Team Meeting with Instructor - NLT November 12th</td>
<td></td>
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<tr>
<td>11-23</td>
<td>Site Client Review</td>
<td></td>
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<td>11-23</td>
<td>Group Meeting: Internal Team Review</td>
<td></td>
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<tr>
<td>11-26</td>
<td><strong>Due:</strong> Detailed Instruction Plan for peer review</td>
<td></td>
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<tr>
<td>12-2</td>
<td>Group Meeting: Internal Team Review</td>
<td></td>
</tr>
<tr>
<td>12-4</td>
<td><strong>Due:</strong> Team and Instructor Reviewed Plans</td>
<td></td>
</tr>
<tr>
<td>12-7</td>
<td>All Pass 2 Assignments must be completed and turned in</td>
<td></td>
</tr>
</tbody>
</table>
PERFORMANCE ANALYSIS

Confident and Accurate Volunteer Discussions at Komen Idaho Montana

Gap Analysis

<table>
<thead>
<tr>
<th>Target Population</th>
<th>Performance</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desired Performance</td>
<td>What we want our race volunteers to do is to...</td>
<td>answer questions related to two primary question families (1. How donated dollars are utilized and 2. The difference between Susan G. Komen national and Komen Idaho Montana)...</td>
</tr>
<tr>
<td>Actual Performance</td>
<td>What our race volunteers...</td>
<td>are doing now is answering questions about Komen Idaho Montana and its services...</td>
</tr>
</tbody>
</table>

Organizational Analysis

Komen Idaho Montana is the regional affiliate of the Susan G. Komen Foundation that serves the states of Idaho and Montana. The organization’s mission is to raise awareness and provide financial assistance and access to breast cancer education, prevention, and treatment. Collectively, the activities of Komen Idaho Montana align with the broader service philosophy of the larger Susan G. Komen organization:

**VISION** - A world without breast cancer.

**MISSION** - Save lives by meeting the most critical needs in our communities and investing in breakthrough research to prevent and cure breast cancer.

**GOAL** - Reduce the current number of breast cancer deaths by 50% in the US by 2026.

Although the impact of *individuals* within Komen Idaho Montana cannot be accurately linked to the Susan G. Komen Foundation’s Vision, Mission, or Goal, the organization does have specific monetary-driven goals related to driving its participation efforts towards *Fundraising Goals*. These are measurements of the dollars raised in fundraising efforts due to the amount of participation at officially-sponsored events like races.
**Fundraising Goals:**

Increasing fundraising dollars is a primary goal of Komen Idaho Montana because it is a self-sustaining non-profit organization with service commitments to the Idaho and Montana markets. The money collected from fundraising events is divided between local services such as funding for mammograms, breast cancer education, and breast cancer medical care for Idaho and Montana residents (75%) and national breast cancer research (25%). To meet the financial commitments it has made, Komen Idaho Montana must maintain a regular flow of donations from a variety of donor sources.

The organization uses various marketing efforts (i.e. social media, emailed newsletters, and print marketing) to attract donations and generate awareness. Donors also interact with the organization through contact with race volunteers. These donors often have questions related to the services and structure of Komen Idaho Montana, and will make donation decisions based on the information received through questioning their race volunteer contact. The success of fundraising efforts with these donors is directly related to the ability of the volunteer to “sell” the organization and to answer questions about Komen Idaho Montana accurately and confidently, or properly escalate the question to the correct resource.

The ability of Komen Idaho Montana to meet Fundraising Goals is essential to the ongoing success of the organization. Organizational leaders insist that Komen Idaho Montana needs to increase fundraising. To do that, staff members and volunteers of Komen Idaho Montana need to be able to discuss the organization in such a way that draws interest and support.

The current performance of the race volunteers does not adequately support the growth of the organization, including fundraising goals. This is evident in the continued drop in funds received from race events. Failure to close this gap will limit the ability of Komen Idaho Montana to effectively meet its vision, mission, and goals.

**Cause Analysis**

<table>
<thead>
<tr>
<th>Data sources</th>
<th>Data gathering methods</th>
<th>Findings</th>
</tr>
</thead>
</table>
| Jodi Weak, Executive Director, Komen Idaho Montana | Interview             | • Current performance:  
  0 Jodi estimates that desired performance happens about 25% of the time. There are currently no formal methods of measuring this at Komen Idaho Montana.  
  0 According to fundraising data, annual donations (cumulative from all race events) have dropped 5% since 2016 and 27% since 2012.  
  0 Desired performance: |
The organization wants volunteers to be answering questions accurately at least 85% of the time, with a high level of confidence and 90% correct escalation when the question cannot be answered. Additionally, Jodi wants to leverage these critical interactions to drive fundraising and participation at race events. She expects volunteers to “sell” the organization or the event whether they can answer the question or they have to escalate it.

- The expectations for answering questions are more complex than simple accuracy measures:
  - The volunteers encounter questions primarily in regard to donation dollar distribution and differences between Komen Idaho Montana and the Susan G. Komen national foundation in a plethora of situations (i.e. public Komen Idaho Montana events, interpersonal conversations within the organization, interpersonal conversations outside of the organization, and during phone conversations related to event coordination and funding efforts. Volunteers must be proficient in answering questions or able to escalate the question regardless of the situation).
  - Answers must be accurate per organizational data and correctly reflect Komen Idaho Montana’s mission and its efforts.
  - Answers must be confidently given and aligned in a way that “sells” the organization.
  - If a sufficient answer cannot be given at the time the question is asked, the volunteers and board members must provide the proper method of escalation (directing towards official sources like the website, following up personally with the questioner, escalating the question to the correct member of the organization).

- Approximately 300-500 “day-of-race” volunteers arrive to the event and are briefly informed of their role in that day’s event. They do not receive formal training regarding answering Komen Idaho Montana specific questions or how to leverage website information to answer questions from the public. The race volunteers, or “key” volunteers, serve as group leaders since they are more long-term volunteers and have more Komen Idaho Montana event experience. These Key volunteers are the ones who answer the questions/escalate and those who will receive training to help them attain exemplary performance.

| Komen Idaho Montana website (http://komenidahomontana.org/) | General Research | • Vision, Mission, Goals |
## 20 Race Volunteers

10 question anonymous survey via SurveyMonkey
(14 of the 20 volunteers completed the survey)

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-3 months</td>
<td>0.00%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>14.29%</td>
</tr>
<tr>
<td>6-12 months</td>
<td>0.00%</td>
</tr>
<tr>
<td>1-3 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>5-10 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>Over 10 years</td>
<td>21.43%</td>
</tr>
</tbody>
</table>

1. How long have you been an active volunteer for Komen Idaho Montana?

2. On a scale of 1-10, what is your confidence level when answering questions regarding funding the Komen Idaho Montana organization and where the donation dollars go? (1=Very UNconfident, 5=Neutral, 10=Very Confident)
   Average score: 7.29

3. On a scale of 1-10, what is your confidence level when answering questions regarding the difference between the local Komen Idaho Montana organization and the national Susan G. Komen Foundation in TX? (1=Very UNconfident, 5=Neutral, 10=Very Confident)
   Average score: 6.64

4. Type your answer to this question below: “If I donate $500 to Komen Idaho Montana, where does my money go?”
   6 answers were 85-100% correct; 4 answers were 60-84% correct; 4 answers were < 60% correct.

5. Type your answer to this question below: “How does the local Komen Idaho Montana organization differ from the national SGK Foundation?”
   2 answers were 85-100% correct; 8 answers were 60-84% correct; 3 answers were < 60% correct.

6. How do you currently obtain answers to the most common questions asked by breast cancer patients, patients’ family members, race participants, donors, and the general public? (Check all that apply)
7. Why should someone donate their time and/or money to Komen Idaho Montana? Write a response that you think would be most effective in getting someone to donate or participate in a Komen Idaho Montana fundraising race.

Responses

- The money goes towards funding of current cancer patients. The money goes towards things like food vouchers, mammograms vouchers and transportation vouchers.
- It is also granted to businesses that can help with the above options.
- We need to find a cure
- Komen has been proven to be effective in providing services to needed clients who might otherwise not receive help especially in rural areas of Idaho and Montana.
- For participation:
  - We all have a mother & grandmother, some have sisters, aunts, wives, daughters, friends - somebody you know and love will be impacted by breast cancer (1 in 8) - the time you spend now will help someone’s person (if not your own).
  - In addition, to women, men too get breast cancer and often are in support role - helping spread those messages are DONE.
  - The local office helps women who are just diagnosed with anything they need. They also help women in the most rural parts of the states. Most of the money stays here.
  - Because its a great organization that needs more voices reaching out
  - The Komen organization helps to find prevention strategies and fund research for a cure.
  - women
  - Bring awareness to breast cancer diagnosis and treatment. Advocate for those with breast cancer.
  - Komen is working on the Big Bold Goal to reduce breast cancer deaths by 50% in 10 years.
  - We all need to help our fellow man. What better way to start than in your own home town it directly helps the uninsured/under insured in our local area.
8. How do you currently escalate questions if you do not know or are unsure of the answer? (Check all that apply)

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Komen Idaho Montana staff (via text, phone, &amp;/or email)</td>
<td>95.71%</td>
</tr>
<tr>
<td>Direct them to a particular page on the Komen Idaho Montana website</td>
<td>42.86%</td>
</tr>
<tr>
<td>Refer them to another volunteer</td>
<td>14.29%</td>
</tr>
<tr>
<td>Give them Komen Idaho Montana staff's contact info</td>
<td>21.43%</td>
</tr>
<tr>
<td>I don't escalate questions</td>
<td>0.74%</td>
</tr>
</tbody>
</table>

Answered: 14
Skipped: 0

9. What is the most challenging question you have ever been asked in regards to the funding or services of either the local Komen Idaho Montana organization or the national SGK Foundation?

- Questions about why we fund Planned Parenthood. Also questions about how staff gets paid when this is a nonprofit organization.
- People have said they have called for help and the foundation was not able to help them, why wasn’t I helped?
- What is Komen’s position as it relates to planned Parenthood?
- Specific questions about treatments or facilities that have mammography (if I don’t have the map) or facilities that have treatment options.
- Why the founder can afford expensive jewelry when she’s not making a lot of money.
- Why did eastern Washington discontinue their Komen affiliate?
- Lots of questions if the funds raised stay local.
- Where does the money go national?

10. What do you think you are missing to be able to answer questions accurately and deliver in a more confident manner?
Job Aid / EPSS Analysis

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Can people perform the job task without a significant amount of practice?</strong></td>
<td>Y</td>
<td></td>
<td>While some elements of the task require only recall levels of knowledge (answering informational questions) and do not require rehearsal, the critical components of the task require navigation of variables and multiple steps. According to the survey data, the volunteers lack proficiency in each of the performance points (confidence, accuracy, and proper escalation). Furthermore, we know that most of the volunteers have been with Komen Idaho Montana for more than one year and will need to alter their existing knowledge as well as gain new knowledge and behaviors. The sum of this compound change indicates that the volunteers will need to practice this task to achieve performance targets.</td>
</tr>
</tbody>
</table>
2. Is it important for people/learners to obtain both:
   - Coaching (including error detection and correction) as they perform a task?
   - Delayed feedback (about the extent to which performance met standards and how to improve it) after they perform a task?

| Y | The compound and complex nature of the performance standards indicate that both coaching and delayed feedback will be necessary for the volunteers. Coaching, specifically error detection and correction, will be necessary for volunteers to understand the level of accuracy they have reached as they answer or escalate the question. This is because they must decode the nature of the question AND give an appropriate response. Coaching will help them understand to what degree they have been successful with each. Delayed feedback will be important as volunteers master the selling of the organization or the race event, which is a critical part of the performance expectation. There are many ways a volunteer might approach this in the real world, and they will need feedback to help them understand when they have successfully used selling statements are compelling and appropriate to the question asked, as well as how well they have presented the statements. |

3. Is it important to provide learners with a safe, controlled environment in which they can make mistakes as they learn?

| Y | There are a limited number of race events each year, and thus a limited number of opportunities to gain donations and participation from the public. The risk of practicing this performance in the real world, without a safe and controlled environment where mistakes can be made, is that errors can have a critical financial impact on the organization. Elaborative rehearsal in the context of a training event will lead them to the mastery they need to succeed in the real world. |

4. Is there an expectation of interactive learning?

| Y | Yes, the client has mentioned practice via role play as a desired training method. Additionally, the task itself is interactive and requires interpersonal communication every time it is performed in the real world. It follows that interactive practicing during training would provide the most realistic learning environment. |

5. Are people required to perform the task quickly and smoothly in the workplace?

| Y | There is no time limit on this task for race volunteers and the client has encouraged volunteers to actively engage with questioners. Conversation length may be limited by unpredictable environmental factors during an event, however, and volunteers should be able to efficiently respond to questions before distractions arise. They must also complete the task smoothly as per the expectation of confident performance. |

6. Are people required to perform the task in situations that are unpredictable?

| Y | The “workplace” itself is unpredictable as the public race events are the workplace for these race volunteers. Although the families of questions are predictable, there are several factors which make each discussion unique: The volume of questions varies from one event to another, and even from one questioner to the next. Tone is highly unpredictable, and volunteers will need to differentiate between tones that are inquisitive versus assumptive or hostile. We know from our client interview that both are common. The specificity of the questions varies, which will challenge the recall ability of the volunteers. |
7. Does one or more of the following reasons for NOT relying on a job aid alone exist in the on-the-job environment:

- A physical barrier that makes it difficult to use a job aid on the job
- A social barrier that makes it difficult to use a job aid on the job

Y

There is a significant social barrier for having a job aid in any form at a public event. When a question is asked of a volunteer or board member, he or she must respond in a way that demonstrates knowledge and confidence. A paper or electronic job aid will interrupt the flow of conversation and damage performance. Additionally, the variability of the workplace creates a social barrier. Volunteers might be asked a question about the organization at any time in their personal or professional lives. It is unreasonable for a job aid to be present at all times.

Our client has informed us that job responsibilities of volunteers will inhibit their ability to carry a job aid consistently at public events like races. The client was interested in the idea of possibly creating QR codes that could be scanned by the public to answer a specific question (i.e. Where does my donation dollars go? Scan this QR Code to see the distribution of donation dollars.)

Summary

There is a gap between existing and desired performance.

What we want our Race Committee Volunteers to do is to answer questions about Komen Idaho Montana and its services with 85% accuracy, 90% confidence, and with 90% proper escalation when they are unable to answer the questions, though what they are doing now is answering those same questions with limited accuracy and confidence, and providing inadequate follow-up and escalation.

The gap aligns with at least one strategic business objective and is worth closing.

Fundraising is a primary goal of Komen Idaho Montana because it is a self-sustaining organization with service commitments to the Idaho and Montana markets. To meet the financial commitments it has made, Komen Idaho Montana must maintain a regular flow of donations from a variety of donor sources. The success of fundraising efforts with these donors is directly related to the ability of the volunteer to “sell” the organization and to answer questions about Komen Idaho Montana accurately with confidence, or escalate the inquiry to the appropriate resource.

Just a job aid won’t resolve the issue

Primary performance gap lies in lack of guidance and skill, rather than just a lack of knowledge that could be addressed with a job aid alone. The client has admitted that knowledge resources are not currently available to the volunteers and that providing knowledge when volunteers are onboarded might prevent serious performance issues. Through our analysis, however, we have found that reading FAQ documents and studying instructions alone would not help volunteers achieve the skills needed to perform successfully. The tasks required to close the performance gap require complex, cognitive operations, including situation recognition, decision-making, and problem solving.

- **Situation recognition** - Define the problem/question and the interests of the contact (the why).
- **Decision making** - Decide how to answer the question based on the needs/interests of the questioner while complying with the performance standards of the organization.
- Problem solving - Answer the question(s) while encouraging fundraising or event participation when the questioner’s interests do not necessarily align with those of the organization.

“These tasks contain invisible elements that are hard to observe. They also require nuanced actions, techniques, or decisions that a job aid alone cannot represent. To build the skills to perform these tasks, people will need to practice them in a safe environment, receive coaching as they practice (error detection and correction), and receive delayed feedback after they practice,” (Villachica, 2017, Fall).

References

# TASK ANALYSIS

## Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

### Data Sources

<table>
<thead>
<tr>
<th>Selected Task Analysis Method</th>
<th>Rationale</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedural Task Analysis</td>
<td>This process contains a series of sequential steps to answer questions from certain question families. This type of analysis best shows the series of decisions the volunteers must make as they use the information from training and the instructional aid to craft quality responses.</td>
<td>Interview and follow up with Executive Director - Jodi Weak. Anonymous survey of race volunteers.</td>
</tr>
</tbody>
</table>

### Task Characteristics

<table>
<thead>
<tr>
<th>Major Task</th>
<th>Goals</th>
<th>Cues</th>
<th>Resources</th>
<th>Standards</th>
<th>Prerequisite Skills</th>
</tr>
</thead>
</table>
| **1. Answer questions regarding the organization structure, finances, and fundraising distribution for Komen Idaho Montana.** | Individual: Answer questions confidently and accurately, and in a way that promotes donations and event participation for the organization. **Organizational:** Promote positive awareness with the public, and encourage donation and event participation to increase fundraising dollars. | The task will be initiated when the learner is asked a question from one of the following question families: A. Fundraising B. Organizational Structure | Preparatory  
- Instructional Aid (see Appendix A)  
- Komen Idaho Montana Website  
- Jodi Weak  
- Komen Idaho Montana Staff | Utilize a friendly, consultative approach. Answer questions with ≥ 85% accuracy. Encourage donation and/or event participation. | Can communicate clearly. Can escalate questions via text, phone, &/or email. Can multitask or delegate during the race so that individual role and questioners are served. |
| **2. When unable to answer a question, escalate the question to the correct organizational resource.** | Individual: Properly escalate unanswered questions to the best resource **Organizational:** Capture concerns and questions from potential donors and participants to increase fundraising dollars. | This task will be initiated when the question asked of the volunteer cannot be answered from retained knowledge. | Preparatory  
- Jodi Weak  
- Komen Idaho Montana Staff | This task is performed correctly when the escalation is:  
- Escalated to the correct source (website or Komen staff)  
- Delivered to Komen staff within 4-6 hours. | |
| **3. Encourage the questioner to get involved (donation or participation) to increase fundraising dollars.** | Individual: Fulfill individual responsibilities as a volunteer and as a Komen representative to the public. **Organizational:** Increase affiliate fundraising dollars through donation. | This task will be initiated when the questions are answered, and the questioner hasn’t left the conversation. | | This task is successfully completed when:  
- The questioner is shown genuine appreciation  
- One or more distinctly encouraging fact or statements is used. |
Completed Task Analysis

1. Answer questions regarding the organizational structure, finances, and fundraising distribution for Komen Idaho Montana.

1.1 Prepare to provide an answer to the question

<table>
<thead>
<tr>
<th>If you are...</th>
<th>Then...</th>
<th>And...</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.11 Talking on the phone with the questioner</td>
<td>Access the Instructional Aid (see Appendix A) and</td>
<td>Turn to the applicable section (Fundraising or Organizational Structure)</td>
</tr>
<tr>
<td>1.12 Speaking with the questioner in person</td>
<td>Refer to your retained knowledge of the Komen Idaho Montana organization.</td>
<td>Decide how to respond: 1. Answer the question from retained information 2. Refer to specific tab on website with correct information 3. Escalate to Komen staff with detailed message</td>
</tr>
</tbody>
</table>

☀ Hot Tip: Allow for the questioner to complete the question without interruption.
☀ Hot Tip: Repeat the question back to the questioner to make sure the meaning was received.

1.2. Provide an answer to the question if you know the answer via recalled information:

Note: All questions addressed by this training detail the organizational structure, finances, and fundraising distribution for Komen Idaho Montana.

<table>
<thead>
<tr>
<th>If you...</th>
<th>Then you...</th>
</tr>
</thead>
</table>
| 1.21 Know the answer to the question and...  
• The questioner is NOT hostile or assumptive.  
• The question requires an informational answer | Use the Question-Answering Process  
1. Use tone that is friendly and confident.  
2. Answer the question using information retained knowledge.  
3. Ask, “Is there anything else I can answer for you regarding Komen Idaho Montana?”  
4. Encourage donation and/or event participation. |
| 1.22 Know the answer to the question and...  
• The questioner IS hostile or assumptive  
• The question requires an informational answer | 1. Use the Question-Answering Process above in 1.21. (Steps 1 & 2)  
2. Ask the questioner if the response has answered the question and has eased his/her concerns.  
3. Escalate if needed using the Escalation Process listed in 2.2.  
4. Encourage donation or event participation if appropriate. |

2. When unable to answer a question from recall (or using an instructional aid when on the phone), escalate the question to the correct organizational resource.

☀ Hot Tip: Prepare to collect contact information to provide follow up. This may be written (using your own pen and paper) or electronic (using your own mobile phone or device).

<table>
<thead>
<tr>
<th>If you...</th>
<th>Then you...</th>
</tr>
</thead>
</table>
| 2.1 Don’t know the answer to the question, but...  
• you know its exact tab location on the Komen Idaho Montana website | Ask the questioner if he/she is familiar with the Komen website and if so refer to that exact tab where the answer is located. |
### 3. Encourage the questioner to get involved (donation or participation) to increase fundraising dollars.

1. **Show appreciation** for their interest in the organization and/or the breast cancer cause.
2. **Provide a fact or statement** which connects the value of participation and fundraising to the breast cancer cause or illustrates the importance of the fight against breast cancer.
3. **Ask them to continue their involvement or interest in the organization.

**Hot Tip:** Share your personal reason for volunteering with Komen Idaho Montana to illustrate the importance of involvement in the cause.

### What Is Critical, Difficult, and Complex:

1. **Complex:** Using questioner tone and nature of question to determine how to respond: answer from recall, point to exact answer location on website, or escalate by taking and delivering a detailed message to Komen Staff.
2. **Critical:** Showing appreciation and sharing information that explicitly encourages the questioner to get involved with the cause.

See Appendix A for Instructional Aid.
Confident Volunteer Discussions at Komen Idaho Montana

Our learners are a group of twenty race volunteers who serve a variety of functions in event operations. They are dispersed between two states (four major cities) and have varied backgrounds and length of tenure within the organization. Although the volunteers are a small workforce in a small non-profit, they do not share many demographic similarities. They are in different locations, have a wide variety of educational and occupational histories, and interact little with one another to develop consistent behaviors. The similarity all volunteers share is the lack of formal training they have received from Komen Idaho Montana.

Sources and Methods

<table>
<thead>
<tr>
<th>Data Sources</th>
<th>Data Collection Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client: Executive Director of Komen Idaho Montana</td>
<td>Other: Phone calls, email communication, web conferencing conversations, and a PowerPoint presentation deck Note: Although the client has been thorough in discussion of relevant information, no extant data was available for formal review.</td>
</tr>
<tr>
<td>Race Committee Volunteers</td>
<td>Survey conducted anonymously through Survey Monkey (see Appendix B)</td>
</tr>
</tbody>
</table>

Note: A complete data set would include information from race attendees who had asked questions of volunteers during past events. This information could not feasibly have been gathered within the scope of this project and does not appear in this analysis or in subsequent documents. Our dependence on information from race volunteers could skew our understanding of the true nature of questions asked, but we have used our client sponsor to corroborate the survey results. We have chosen to treat that information as accurate for this deliverable.

Data-Gathering Instruments
1. Communication with Client: Coordination between the Komen Idaho Montana client and the OPWL ID team was conducted via phone calls, email, and web conferencing. These communications included discussions of the learners, their common tasks, and the functions of the organization which were prompted by pre-determined interview questions.
2. Survey: An initial Survey Monkey with 10 questions was sent to the race committee volunteers. The OPWL ID team received 14 responses from the 20-person volunteer group. The survey responses can be found in the Appendix.

Findings and Implications

<table>
<thead>
<tr>
<th>Relevant Skills</th>
<th>Findings</th>
<th>Data Source</th>
<th>Instructional Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner Characteristic</td>
<td></td>
<td>Communication with the client</td>
<td>Therefore, instruction might include methods that allow volunteers to complete part or all of the training independently. Use of an advance</td>
</tr>
<tr>
<td>Prior Knowledge</td>
<td>Volunteers have a wide range of role-specific knowledge from outside of the organization, which contributes to their</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Komen Idaho Montana
performance in planning and executing fundraising events and other job responsibilities. There is no requirement for education level, and the learners bring a variety of job-specific knowledge and specialties. Academic backgrounds are varied and include learners with high school educations, college degrees, and advanced post-secondary educations. Due to their varied occupations outside of their volunteer roles, they also have varied level of exposure to workplace training methods like eLearning, ILT, etc.

Their time with the organization is also varied, with most of the volunteers having 5 or more years’ experience with the organization (57%). Only 15% of learners have been with the organization for less than one year.

Knowledge of the organization as it relates to answering questions from the public is limited to what they have found on their own or what they have been exposed to on-the-job. The organization does not provide formal training in this area, and learners report the following sources of knowledge: research done independently (75%), Komen (affiliate) website (67%), national SGK website (54%), listening to other volunteers (25%) and volunteering at other organizations (8%).

Survey results also show that the level of correctness for questions related to organizational structure and distribution of funds is similar among all the volunteers.

| Targeted Skills | Performance | organizer will help learners from different backgrounds organize their new knowledge in a structured way. Also, turning ‘Real World’ questions and scenarios into role play learning activities in order to meet the previous and new experience corollaries.

Targeted Skills

The task of answering questions from members of the public happens in an unpredictable way. The setting, timing, and difficulty of the questions are all subject to variation. This can make the task complex and difficult.

Communication

Therefore, a set of structured role-plays utilizing the two question families and practices, which gradually progress in complexity, will be appropriate for instruction. The training should require learners to complete the whole primary task, while the instruction shifts the focus during each stage to more complex elements of the task. The complex elements - questioner tone, difficulty of question, and call to action are the specific areas that can be diversely represented during the demonstration and activation phases. To appropriately account for the
variability of the task in the real world, the application phase will contain practices for fifteen or more question samples. This task sequence provides an adequate representation of what volunteers will do in the real world.

When the volunteers were asked to recall the most difficult question they have received, 5 out of 8 responses were about distribution of funds and would be categorized as “hostile or assumptive” based on the task definitions. This shows the complex and difficult nature of responding to the questions.

Survey result.

Therefore, the instruction should employ structured practice sessions that include diminishing levels of coaching and feedback. To achieve this, an instructor-led session would be optimal to ensure the feedback is verbal and timely to the practice. The volunteers will receive instruction in groups of three according to geographic area. Done this way, we will be able to conduct instruction among our group members.

Additionally, the complex nature of these questions needs to be considered as the practice sessions are designed. It is essential that any scenarios are relevant to the real world (i.e. volunteers multitasking, weather conditions, and/or questioner’s tone can play a role in the complex nature).

### Relevant Contextual Factors

<table>
<thead>
<tr>
<th>Learner Characteristic</th>
<th>Findings</th>
<th>Data Source</th>
<th>Instructional Implications</th>
</tr>
</thead>
</table>
| Orienting Context      | Confidence in the task is lacking and the average self-reported measure of confidence (n=14) was 6.97 out of 10. This shows that the volunteers see that there is an opportunity to learn more or become more proficient in the task. | Survey Results | Therefore, the instruction should include elements that build confidence through successful practice. By utilizing a coaching rubric, the volunteers can see exact areas and/or skills requiring improvement. ARCS strategies:  
**Attention:** The Instructor shares reports proving a decline in donation dollars and event participation over the past four years and how it correlates to questions being inaccurately answered and/or escalated to the proper person.  
**Relevance:** The Instructor will share the importance of answering questions, as well as the consequences to Komen Idaho Montana if donors and/or participants dwindle due to lack of support from the volunteers. Also, Instructor and volunteers will share during the Introduction phase of the training their personal... |
**Confidence:** The volunteers will be provided a Learning Aid that they can study to obtain the correct answers to the two primary question families. During the Demonstration phase, volunteers will be able to view a video with specific teaching points, as well as three different role play practice sessions.

**Satisfaction:** By utilizing a coaching rubric, volunteers can receive constructive feedback which pinpoints opportunities for improvement. They can use these rubrics as benchmarks to monitor their improvement throughout the practice sessions. Finally, the volunteers will obtain satisfaction now knowing they have the correct answers to provide for the most common questions and understand the proper escalation protocol.

<table>
<thead>
<tr>
<th>Instructional Context</th>
<th>Communications with the client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due to the seasonal and annual nature of the race events, volunteers are essentially part-time, seasonal employees. The volunteers have a variety of work and personal obligations outside of their commitments to the organization, and may have limited time to complete training.</td>
<td>Therefore, the instruction should include specific discussion around the relevance of the training and the personal benefit to the volunteers. This could happen during the activation phase as learners are asked to reflect on uncomfortable experiences with answering questions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instructional Context</th>
<th>Communication with client</th>
</tr>
</thead>
<tbody>
<tr>
<td>The learners are dispersed across two states and are generally located in or around four different cities. The volunteers have a variety of work and personal obligations outside of their commitments to the organization, and may have limited time to complete training.</td>
<td>Therefore, the instruction should be designed so that volunteers can participate asynchronously. If asynchronous methods are not used, then volunteers will be best served if part of the training can be completed independently. This might take the form of pre-work or use of an advanced organizer.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instructional Context</th>
<th>Communication with client</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteers do not have devices that are issued by the organization and will be using their personal phones, computers, etc. to complete training for Komen Idaho Montana.</td>
<td>Therefore, the organization should use tools and technologies that do not require special knowledge or equipment (i.e. utilizing Zoom for web conferencing). If the client were to use virtual meeting software, for example, it should be web-hosted rather than installed and should be basic enough to be accessed on shared computers.</td>
</tr>
</tbody>
</table>
The learners have not received formal training from the organization. As volunteers, they have not worked together as a single unit, and typically work in smaller groups based on location and event.

Transfer Context

Volunteer time with the organization is limited and irregular. In traditional workplace terms, volunteer roles are part-time and seasonal. Volunteers spend most of their time with Komen Idaho Montana during the coordination of specific race functions which may include about 3 months of effort. Hours spent by volunteers during work will be widely varied depending on function/role for the race. Volunteers may be asked questions at any time during or outside of their activities with the organization, but the primary application of this skill will take place during events. This presents an obstacle for transfer since real-world application may be limited.

Communication with client.

Therefore, the volunteers will be experiencing formal training for the first time from this organization. Use of a familiar technology (Zoom) would be helpful to create a more stable learning environment. As per Merrill’s demonstration corollary, the media used should play a relevant instructional role without competing for the learner’s attention.

Communication with the client.

Therefore, the volunteers should be asked to take the training at a time that is relevant to their efforts with the organization. Training completed months before the race may not be as effective as training taken immediately before race efforts begin.

Mode of Delivery

<table>
<thead>
<tr>
<th>Delivery Mode (select one or more)</th>
<th>Rationale</th>
</tr>
</thead>
</table>
| o Instructor-led training. Can include:  
  o Traditional classroom  
  o Virtual classroom  
 o Self-paced training. Can include:  
  o Print-based workbooks  
  o Online/eLearning that learners complete individually  
 o Structured on-the-job training  
 o Flipped classroom. | The training will be conducted in an instructor-led format in a virtual classroom setting. Due to organizational limits, use of Zoom (a free service that is currently in use in the organization) will be the primary medium. The rationale behind this choice is:  
  ● The volunteers are dispersed and a virtual classroom will allow them the benefit of working with the instructor and other volunteers during the training. This will be essential for practice and coaching.  
  ● The technology is familiar and will not distract the volunteers from the objective of the training.  
  ● The training can be conducted in several sessions to allow for it to occur close to the time of race events when it will be most relevant to the volunteers.

As part of the instruction, the volunteers will be provided with an advanced organizer and pre-work assignment which is an Instructional Aid for the volunteers to review. Both will:  
  ● Allow them to gain knowledge independently, which is appropriate for a
group with diverse education and experience.

- Allow volunteers with different levels of experience to work at a pace that is comfortable to their level of prior knowledge.

See Appendix B for Learner Analysis survey questions and results.

References


JOB-FOCUSED OBJECTIVES

Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

Critical Tasks that the Training Will Address
1. Use questioner tone and nature of question to determine how to respond: answer from recall, point to exact answer location on website, or escalate by taking and delivering a detailed message to Komen Staff.
2. Show appreciation and share information that explicitly encourages the questioner to get involved with the cause.

Job-Focused Instructional Objectives

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(1) Answer questions</td>
<td>Cues: ● A question about Komen Idaho Montana’s organizational structure or fund distribution is asked of a race event volunteer. ● The question requires a response. ● The tone is either neutral, hostile, or assumptive. Resources: ● Instructional Aid (if communicating on the phone). ● Komen Idaho Montana staff for escalating questions.</td>
<td>● The answer is accurate. ● The unanswered question is escalated to the correct source: ○ A specific location on the Komen Idaho Montana website or ○ A member of the Komen Idaho Montana staff ● The answer is provided immediately if the volunteer knows the answer. ● The question is escalated within 6 hours if the volunteer does not know the answer.</td>
</tr>
<tr>
<td>2</td>
<td>(3) Encourage the questioner to get involved (donation or participation)</td>
<td>Cues: ● The questioner has either received an answer or has been advised of the escalation ● The questioner has not left the conversation. ● The tone of the conversation is either neutral, hostile, or assumptive. Resources: ● Instructional Aid (if communication on the phone).</td>
<td>● The race volunteer thanks the questioner for their interest. ● The race volunteer provides a relevant fact or statement that fulfills one or more of the following criteria: ○ Shows value of fundraising through an example of how donated funds are used. ○ Shows importance of the fight against breast cancer. ○ Shows personal connection to the cause with an anecdote. ● The race volunteer explicitly asks for the questioner’s continued involvement in the Komen Idaho Montana cause.</td>
</tr>
</tbody>
</table>
PERFORMANCE ASSESSMENT INSTRUMENT

Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

Objectives

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
</table>
| 1 | (1) Answer questions | Cues  
- A question about Komen Idaho Montana’s organizational structure or fund distribution is asked of a race event volunteer.  
- The question requires a response.  
- The tone is either neutral, hostile, or assumptive.  
Resources  
- Instructional aid (if communicating on the phone).  
- Komen Idaho Montana staff for escalating questions. |  
- The answer is accurate.  
- The unanswered question is escalated to the correct source:  
  - A specific location on the Komen Idaho Montana website  
  - A member of the Komen Idaho Montana staff  
- The answer is provided immediately if the volunteer knows the answer.  
- The question is escalated within 6 hours if the volunteer does not know the answer. |
| 2 | (3) Encourage the questioner to get involved | Cues  
- The questioner has either received an answer or has been advised of the escalation  
- The questioner has not left the conversation.  
- The tone of the conversation is either neutral, hostile, or assumptive.  
Resources  
- Instructional aid (if communication on the phone). |  
- The race volunteer thanks the questioner for their interest.  
- The race volunteer provides a relevant fact or statement that fulfills one or more of the following criteria:  
  - Shows value of fundraising through an example of how donated funds are used.  
  - Shows importance of the fight against breast cancer.  
  - Shows personal connection to the cause with an anecdote.  
- The race volunteer explicitly asks for the questioner’s continued involvement (either participation or donation) in the Komen Idaho Montana cause. |

Type of Assessment and Rationale

<table>
<thead>
<tr>
<th>Type of assessment</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Product assessment</td>
<td>As described in the task analysis, the process of answering questions is a series of decisions and responses that the volunteers will make without tangible support at race events. To evaluate the performance of the major tasks, the instructors will need to watch it as it is occurring. This makes it worthwhile to include a process assessment (in the form of role-plays with a rubric) in the limited instructional time of 2-3 hours. Given the relatively short execution time for this task in the real world and the lack of setup time required for assessment, a process assessment is as feasible as it is valuable. Additionally, answering questions leaves no visible product to assess and rules out a product assessment as an appropriate method of evaluation.</td>
</tr>
<tr>
<td>X Process assessment</td>
<td></td>
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</tbody>
</table>

Komen Idaho Montana  
Eisel, Lamkins, Orr, Wright
Assessment Instrument
The performance assessment consists of three role plays which will be initiated by the instructor, conducted individually, and scored per a provided checklist. Each role-play takes 1-3 minutes and the delivery of the results will take 1-3 minutes (for a total of 5-12 minutes).

Instructions for Instructor:
Setup:
● Prepare a blank assessment of the online Assessment Checklist for each volunteer.
Facilitation:
● Explain the instructions for the assessment to the group as a whole:
  o The volunteers will be asked to role-play three scenarios and will play the part of volunteer for each.
  o The role-plays will happen consecutively.
  o They will not have resources outside of the conversation and should not have any instructional aids on hand.
  o The volunteers should respond to questions and perform the role play as if they were at a real race event. They should not use phrases like “I would say...” or “I would tell them to...”
  o The volunteers will be given results immediately after the assessment has ended.
● Break the volunteers into breakout rooms so that the assessment is done individually.
● Use the provided scenarios to evaluate skills and use the assessment checklist to score the performance.
● After all three scenarios are complete, compute the results and deliver score to the volunteer. Let them know that further feedback and coaching will be available post-training.
● When the training is over, email the results of the assessment (the completed checklist including the comments section) to the volunteer.

Scenario 1:
1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:
   “We are at a race and the main event has not started. You are stationed in the sign-in area, directing attendees to the appropriate locations to check in. You are stopped by me - an attendee who will be running in the event. I smile and say ‘excuse me’ as I gain your attention.”
2. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role-play by asking the initiating question from the perspective of your character profile (below).
3. Stay in character throughout the role-play.

Character profile:
● Your tone is neutral. You should display curiosity (not hostility) as you ask the question.
● You take the answers of the volunteer at face value – you do not respond with further critical questions.

Question profile:
● “My team has been working on our race donations for weeks. I know that it helps people with breast cancer, but what exactly do you guys use the money for?”
● This question should not require escalation to the staff and should only be escalated to the website if it cannot be answered by the volunteer.

Scenario 2:
1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:
   “We are at a race and the main event is in motion. You are stationed near the finish line for the race, arranging the water station and waiting for runners to start finishing the race. There is a crowd of spectators – attendees who are associated with the runners but are not racing themselves. I approach you by myself. I have my arms crossed, am not smiling, and am making direct eye contact.”
2. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role-play by asking the initiating question from the perspective of your character profile (below).
3. Stay in character throughout the role-play.

Character profile:
- Your tone is neutral. You should display curiosity and some skepticism (not hostility) as you ask the question. You are polite but not overly friendly.
- You should seem skeptical of the donation and fundraising structure. You have a general distrust of how non-profits work but no open hostility towards Komen Idaho Montana.

Question profile:
- “I’ve been to a few of these races already and I feel like I see that Komen logo all over the place. I’m sure it’s a good cause, but I don’t see how giving all this money to some big charity is going to help us here in Idaho. I want to be able to donate locally. Can I guarantee that a check I write to you guys will support the people in this community?”
- The volunteer may decide to give some information on how funds are distributed, but they will not be able to answer the question about directing specific funds to specific places. This question should require escalation to the staff to provide the questioner more information for his potential donation.

Scenario 3:
1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:
   “We are at a race and the main event is in motion. You are stationed near the finish line for the race, arranging the water station and waiting for runners to start finishing the race. There is a crowd of spectators – attendees who are associated with the runners but are not racing themselves. I approach you with a friend and my body language is closed. My arms are crossed and I seem irritated.”

2. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role-play by asking the initiating question from the perspective of your character profile (below).

3. Stay in character throughout the role-play.

Character profile:
- Your tone is hostile. You should maintain an inquisitive tone throughout the role-play.
- You should seem skeptical of the donation and fundraising structure. You clearly have a problem with the association of Komen with Planned Parenthood, and those feelings will not be changed based on this conversation.

Question profile:
- “Hi, I need you to help me with something my friend and I are talking about. She said that Komen funds Planned Parenthood, which I didn’t know. I wouldn’t be donating if I thought that my money was going there. Is that true?”
- The volunteer may decide to give some information on how funds are distributed, but they will not be able to answer the question about directing specific funds to specific places. Additionally, this presents an opportunity for a negative perception of the organization to be changed. This question should require escalation to the staff to provide the questioner more information about this question.
### Assessment Checklist

<table>
<thead>
<tr>
<th>Practice 1</th>
<th>Practice 2</th>
<th>Practice 3</th>
<th>Criteria</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check ✓</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

#### Objective 1: Answer questions

- The answer is accurate. *(No inaccurate information was given, even if the question could not be answered completely or without escalation)*

- The answer is provided immediately if the volunteer knows the answer. The escalation source is given immediately if they do not.

- The unanswered question is escalated to the correct source:
  - A specific location on the Komen Idaho Montana website
  - A member of the Komen Idaho Montana staff

#### Objective 2: Encourage questioner to get involved

- The race volunteer thanks the questioner for their interest.

- The race volunteer provides a relevant fact or statement that fulfills one or more of the following criteria:
  - Shows value of fundraising through an example of how donated funds are used.
  - Shows importance of the fight against breast cancer.
  - Shows personal connection to the cause with an anecdote.

- The race volunteer explicitly asks for the questioner’s continued involvement (either participation or donation) in the Komen Idaho Montana cause.

<Total the checks in each column and enter here.>

Add all the checks together, and enter total here →

Pass=5 Pass=5 Pass=5

<Write Pass/Fail according to scoring criteria here →>

Pass=15

### Mastery level

The choice of a performance assessment that includes three role-plays is supported by the following:

- The possibility of a learner getting it right by chance is low. This process requires a specific and correct sequence of decisions throughout the conversation that is not likely to happen using guesses.

- The variety of conditions in the real world can be estimated. Although some of the situational factors are highly variable (weather, crowd size, race event role, etc.) the degree of difficulty of the questioning can be anticipated and used in the evaluation. A short series of role-plays with varying degrees of difficulty will be sufficient to determine mastery.

The mastery score of 5/6 for each of the three role-play exercises or 15/18 overall; this is an accurate reflection of expected performance standards in the real world. The organization has accuracy and escalation expectations below 100% and this assessment reflects that. The volunteer CAN pass the assessment with a score of at least 15/18, even if one or more of the individual role plays results in a fail. The results of the assessment can then be used for optional individual coaching before a real race event.

If a volunteer receives a score below the mastery level, the race team leader provides coaching and uses this instrument to re-assess prior to the next race event.
INSTRUCTIONAL PLAN WORKSHEET

Komen Idaho Montana Volunteers
Answer Questions with Accuracy and Confidence

A. Overall length of the training program

Design Notes:
1. The critical tasks the training will address are:
   - Use nature of question (Komen Idaho Montana organizational structure or fund distribution) and questioner tone to
determine how to respond: answer from recall, point to exact answer location on website, or escalate by taking and
delivering a detailed message to Komen Idaho Montana staff.
   - Show appreciation for interest and attendance; share information that explicitly encourages the questioner to get
involved with the cause.

2. A “Whole-to-Part” design will be implemented based on the findings of the Learner Analysis, Performance Analysis, and
   Learning Objectives.

3. Three weeks before training, race volunteers will receive a FAQ Instructional Aid and will be asked to know these questions and
   answers before training occurs and for each event. Links to the Komen Idaho Montana and Susan G. Komen Foundation
websites will be listed on the Instructional Aid as additional resources if the volunteers wish to learn more.

4. The volunteers will receive instructions on how to download the Kahoot! app prior to the training. The Kahoot! game utilizes a
gamification element to discuss information from the Instructional Aid and supports the Activation phase.

5. The Performance Assessment will take place during the Application phase and will consist of four role plays which will be
   initiated by the instructor, conducted individually, and rated per a provided rubric. Each role play will take 3-5 minutes and the
delivery of the results will take 1-3 minutes (for a total of 10-18 minutes). A delayed feedback coaching session utilizing the
rubric will be conducted after the second and fourth role play.

| How long (in minutes) is the entire training program? | 180 minutes |
| How many units will you include in the training program? | 1 unit |

B. Description of each element of the training program

Introduction to the training program

<table>
<thead>
<tr>
<th>Time</th>
<th>Description</th>
</tr>
</thead>
</table>
| 15 minutes | The purpose of this training is to increase race volunteers’ performance in the accuracy of answering questions, escalating questions properly to the Komen Idaho Montana staff, and implementing a “call to action” within each interaction. This performance improvement is important because they are speaking with current and potential donors and race participants who also give funds to take part and contribute to the cause. The race volunteers are the connectors between the organization’s cause, strategic business goals, donors, and race participants, as well as providers of accurate information. This training will provide race volunteers the instruction and authentic practice answering frequently asked questions accurately, proper escalation, and implementing a “call to action.”

The facilitator begins by doing the following:
a) Welcoming the participants to the training;
b) Introducing him/herself;
c) Explaining why he/she chose to volunteer (or work) for Komen Idaho Montana; |
d) Explaining why this training is important to the volunteers (to increase their confidence and comfort level with questioning during events) and to Komen Idaho Montana (to support fundraising and participation objectives);

e) Communicating structure of this training session and what they can expect during the live virtual training session, including how coaching feedback with rubrics will be utilized to demonstrate the volunteers’ skill mastery; and

f) Allowing the participants to introduce themselves and share why they chose to volunteer for Komen Idaho Montana.

Unit 1: Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

Objectives:
1. Answer questions
2. Encourage the questioner to get involved by including a “call to action”

<table>
<thead>
<tr>
<th>Phase</th>
<th>Time</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activation</td>
<td>15 minutes</td>
<td>Based on mnemonic: Right Information, Right Action, Right Invitation</td>
</tr>
</tbody>
</table>

  Link **Right Information** with Instructional Aid pre-training work:
  1. Apply gamification with Kahoot! to guide volunteers to recall and explore what they read on the Instructional Aid (the advance organizer) prior to this training and relate it to their experience with answering questions during real race events.

  Link **Right Action** concept to volunteers’ experiences:
  1. Discuss their current understanding and performance for answering questions.

  2. Discuss what happens when the volunteers cannot answer questions.

  3. Explain the components of the task that will be discussed further during the session to increase confidence and effectiveness:
     ● Understanding the tone of the questioner
     ● Providing an answer when the volunteer knows the information
     ● Knowing what to do when the answer is not known
     ● Calling the questioner to action for the cause

  Link **Right Invitation** to their experiences
  1. Ask volunteers questions to get them thinking about how they currently talk to people about donating and participating - how they make that invitation now if they do.

  *Design note: Kahoot! is not a testing tool, it is a contest-based interactive tool for use in discussions during facilitated learning. It will be used to generate participation as the instructor activates prior knowledge and connects to learning.*

<table>
<thead>
<tr>
<th>Demonstration</th>
<th>15 minutes</th>
<th>Demo 1: Play a video of conversation skits showing volunteers answering questions at race events. Pause at critical points - <strong>Right Information</strong>, <strong>Right Action</strong>, <strong>Right Invitation</strong> - to show exemplary performances for responding correctly to tone, answering questions accurately, deciding whether to answer or escalate and using the proper process to do so, and encouraging &quot;call to action&quot;.</th>
</tr>
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<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Demo 2</strong>: Instructor role-plays with a willing participant focusing on critical points - <strong>Right Information</strong>, <strong>Right Action</strong>, <strong>Right Invitation</strong>. Instructor provides reflection of the processes they used to address the question. As the instructor answers, he/she makes thinking visible. “These things are going through my mind at this point...” “I notice...” “So, I respond...” Through addressing Right Information, Right Action, Right Invitation, this technique will highlight critical,</td>
</tr>
</tbody>
</table>
difficult, and complex areas of the task.

**Demo Comparison:** Use the provided rubric to discuss and compare the demonstrations. This serves a joint purpose of showing volunteers how to use the rubric during training and providing a structure for discussing role-plays.

<table>
<thead>
<tr>
<th>Application</th>
<th>100 minutes</th>
</tr>
</thead>
</table>
| a. Number of practices: 4  
Number of formative assessments: 2  
*For training, volunteers will be grouped into threes on a virtual platform (Zoom or similar). Each practice will consist of approximately three rounds of questions per volunteer. There will be one group of six to seven volunteers, two facilitators will each take a group of three.* | |
| b. Write a short description of each application activity in the order in which volunteers will complete them.  
**Practice 1:** Volunteers listen to and answer five questions (i.e. Where do the donation dollars go?) Instructor guides focus to identification of questioner’s tone and accuracy of answers. Instructor uses error-detection during this practice. A post-practice discussion includes feedback, as well as brainstorming on how to incorporate a “call to action.” Utilize the scaffolding of making thinking visible throughout this practice.  
**Practice 2:** Volunteers listen to five slightly more complex questions (i.e. If I donate $500, how much of that money goes to national research?) Instructor focuses coaching on the decision of whether to provide an accurate answer or escalate the question. Answer accuracy and “call to action” remain important behaviors that will be discussed in the delayed feedback, however, the main focus in this practice will be the decision to answer or escalate.  
**Formative Assessment 1:** Delayed feedback will utilize the rubric to provide a knowledge benchmark. Brainstorm how to incorporate a “call to action.” Remind volunteers of making thinking visible throughout this practice.  
**Practice 3:** Volunteers listen to five additional questions that are slightly more complex (i.e. How are donation dollars divided up between local and national efforts, and how much money goes to Admin costs?) and identify tone, decide whether to accurately answer or escalate based on tone, and either answer or execute correct escalation process. A post-practice discussion will provide feedback on the incorporation of the “call to action.”  
**Practice 4:** This practice will mirror the performance assessment. Volunteers listen to five complex questions. They must identify tone, decide whether to answer or escalate, and add a “call to action” to support the fundraising goal of Komen Idaho Montana. No coaching or guidance will occur during this practice.  
**Formative Assessment 2:** A secondary delayed feedback will utilize the rubric will provide an additional knowledge benchmark. | |

<table>
<thead>
<tr>
<th>Integration</th>
<th>10 minutes</th>
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</thead>
</table>
| At the end of the session, each volunteer will share learnings with the class. Instructors will challenge each volunteer to share the following:  
- What did they learn during the training that they did not already know?  
- What did they feel most confident in (what parts of the task they do best)?  
- What is most challenging about the task of answering questions accurately and confidently?  
- How will they remember to use the mnemonic (Right Information, Right Action, Right Invitation) during a fundraising race? Integration after the training: Pre-event role play in-person with the volunteers as a way to reflect and recall skills and maintain skill transfer using the mnemonic. This also gives them the opportunity to fulfill the Watch-Me corollary. | |

**Conclusion to the Training Program**

<table>
<thead>
<tr>
<th>Time</th>
<th>5 minutes</th>
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</table>
Instructor will inform the volunteers that the final stage of training (Integration phase) will occur in-person prior to the next event/race.

**What have volunteers learned and its importance?**
Volunteers will have learned how to increase accuracy of information pre-training using the Instructional Aid, decide whether to answer or properly escalate to more seasoned Komen Idaho Montana staff members, and add a “call to action” to each conversation to increase donation and race participation. The mnemonic will help the volunteers to maintain focus and confidence in conversation, thus providing even better service to the mission.

This training helps volunteers to become more confident and effective when answering questions at events. While answering questions is not usually their primary function, they are often a primary contact at an event for people regarding the organization. Increasing confidence also increases willingness to answer questions, a feeling of accomplishment, and a stronger connection.

**What are volunteers expected to transfer to the “workplace” and its importance?**
Volunteers will transfer the mnemonic device and the associated practiced behaviors to the “workplace” or event days:
- **Right Information:** Increase accuracy of information pre-training using the Instructional Aid;
- **Right Action:** Make the best decision on whether to answer or properly escalate a question; and
- **Right Invitation:** Add a “call to action” to each conversation to increase donation and race participation.

Performance improvement to increase donations and participation is important because Komen Idaho Montana’s strategic business goals were not being met by current performance. The annual donations (cumulative from all race events) have dropped 5% since 2016 and 27% since 2012. The disconnect between accurate information and donors is showing. Closing this performance gap will enable Komen Idaho Montana to connect to donors with accurate information and escalation efficiency.

**References**
CONFIDENT AND ACCURATE VOLUNTEER DISCUSSIONS AT KOMEN IDAHO MONTANA

Course Information

Design Notes:

1. The critical tasks the training will address are:
   ● Use nature of question (Komen Idaho Montana organizational structure or fund distribution) and questioner tone to determine how to respond: answer from recall, point to exact answer location on website, or escalate by taking and delivering a detailed message to Komen Idaho Montana staff.
   ● Show appreciation for interest and attendance; share information that explicitly encourages the questioner to get involved with the cause.

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3. Three weeks before training, volunteers will receive a FAQ Instructional Aid and will be asked to know these questions and answers before training occurs and for each event. Links to the Komen Idaho Montana and Susan G. Komen Foundation websites will be listed on the Instructional Aid as additional resources if the volunteers wish to learn more.

4. The volunteers will receive instructions on how to download the Kahoot! app prior to the training. The Kahoot! game utilizes a gamification element to discuss information from the Instructional Aid and supports the Activation phase.

5. The Performance Assessment (see Appendix C) will take place during the Application phase and will consist of four role plays which will be initiated by the instructor, conducted individually, and rated per a provided rubric. Each role play will take 3-5 minutes and the delivery of the results will take 1-3 minutes (for a total of 10-18 minutes). A delayed feedback coaching session utilizing the rubric will be conducted after the second and fourth role play.

<table>
<thead>
<tr>
<th>Performance Gap(s)</th>
<th>Strategic Business Objective(s)</th>
</tr>
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<tbody>
<tr>
<td><strong>Desired Performance</strong>: What we want our race volunteers to do is answer questions related to two primary question families (1. How donated dollars are utilized and 2. The difference between Susan G. Komen national and Komen Idaho Montana) with 85% accuracy, 90% confidence, and with 90% proper escalation when they are unable to answer the questions.</td>
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</tr>
<tr>
<td><strong>Actual Performance</strong>: What our race volunteers are doing now is answering questions about Susan G. Komen national and Komen Idaho Montana with limited accuracy and confidence, and providing inadequate follow-up and escalation.</td>
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</tr>
<tr>
<td><strong>Design note</strong>: As the performance assessment instrument does not measure confidence, Komen Staff can conduct a post-training survey and some follow-up calls.</td>
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</table>

Increasing fundraising dollars is a primary goal of Komen Idaho Montana because it is a self-sustaining non-profit organization with service commitments to the Idaho and Montana markets.

To meet the financial commitments, Komen Idaho Montana must maintain a regular flow of donations from a variety of donor sources. Potential donors often interact with the organization through contact with race volunteers, asking questions related to the services and structure of Komen Idaho Montana, and will make donation decisions based on the information received through questioning their race volunteer contact. The success of fundraising efforts with these donors is directly related to the ability of the volunteer to “sell” the organization and to answer questions about...
Komen Idaho Montana accurately and confidently, or properly escalate the question to the correct resource.

The current performance of the race volunteers does not adequately support the growth of the organization, including fundraising goals. This is evident in the continued drop in funds received from race events. Failure to close this gap will limit the ability of Komen Idaho Montana to effectively meet its vision, mission, and goals.

<table>
<thead>
<tr>
<th>Mode of Delivery</th>
<th>Rationale</th>
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</thead>
</table>
| Virtual Classroom | The training will be conducted in an instructor-led format in a virtual classroom setting. Due to organizational limits, use of Zoom (a free service that is currently in use in the organization) will be the primary medium. The rationale behind this choice is as follows:  
  - The volunteers are dispersed and a virtual classroom will allow them the benefit of working with the instructor and other volunteers during the training. This will be essential for practice and coaching. 
  - The technology is familiar and will not distract the volunteers from the objective of the training. 
  - The training can be conducted in several sessions to allow for it to occur close to the time of race events when it will be most relevant to the volunteers.  
The volunteers will be grouped into smaller sub-groups of 3-6 participants for completion of this training and will be asked to review an Instructional Aid as pre-work for this training session. |

**Sequencing of Objectives**

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
</table>
| 1 | (1) Answer questions                                                        | Cues                                                                                 | ● The answer is accurate.  
  ● The answer is provided immediately if the volunteer knows the answer.  
  ● The unanswered question is escalated to the correct source:  
    ○ A specific location on the Komen Idaho Montana website  
    ○ A member of the Komen Idaho Montana staff  
  ● The question is escalated within 6 hours if the volunteer does not know the answer. |
|   |                                                                             | Resources.                                                                           |                                                                                    |
|   |                                                                             | ● Instructional Aid (if communicating on the phone).  
  ● Komen Idaho Montana staff for escalating questions. |                                                                                    |
| 2 | (3) Encourage the questioner to get involved                                | Cues                                                                                 | ● The race volunteer thanks the questioner for his/her interest.  
  ● The race volunteer provides a relevant fact or statement that fulfills one or more of the following criteria: |
|   |                                                                             |                                                                                      |                                                                                    |
The tone of the conversation is either neutral, hostile, or assumptive.

**Resources**
- Instructional Aid (if communication on the phone).
- Shows value of fundraising through an example of how donated funds are used.
- Shows importance of the fight against breast cancer.
- Shows personal connection to the cause with an anecdote.
- The race volunteer explicitly asks for the questioner’s continued involvement (either participation or donation) in the Komen Idaho Montana cause.

**Division of Objectives into Units**

**Unit 1: Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence**

**Objectives:**
1. Answer questions
2. Encourage the questioner to get involved

**Introduction**

<table>
<thead>
<tr>
<th>Course Element</th>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Graphics and Media</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Introduction</td>
<td>The purpose of this training is to increase race volunteers’ performance in the accuracy of answering questions, escalating questions properly to the Komen Idaho Montana staff, and implementing a “call to action” within each interaction. This performance improvement is important because race volunteers are speaking with current and potential donors and race participants who also give funds to take part and contribute to the cause. The race volunteers are the connectors between the organization’s cause, strategic business goals, donors, and race participants, as well as providers of accurate information. This training will provide race volunteers the instruction and authentic practice answering questions accurately, utilizing proper escalation, and implementing a “call to action.” The facilitator begins by doing the following:</td>
<td>- Zoom download and login instructions</td>
<td>- Komen Idaho Montana PowerPoint</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Course Introduction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
E. Communicating structure of this training session and what they can expect during the live virtual training session, including how coaching feedback with rubrics will be utilized to demonstrate the volunteers’ skill mastery; and

F. Allowing the participants to introduce themselves and share why they chose to volunteer for Komen Idaho Montana.

Describe the structure (Advance Organizer) for the training program as a whole (structure)

- **Right Information** - Emphasis on giving accurate answers to questions asked
- **Right Action** - Decision to answer accurately or escalate and follow through
- **Right Invitation** - Connecting with “call to action” to donate or participate
## Unit 1 - Komen Idaho Montana Volunteers Answer Questions with Accuracy and Confidence

<table>
<thead>
<tr>
<th>Course Element</th>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Graphics and Media</th>
<th>Estimated Time</th>
</tr>
</thead>
</table>
| **Unit Objective(s)** | 1. Answer questions accurately or properly escalate to correct source.  
2. Add a “call to action” statement regarding increased donation or participation. | - Instructional Aid from pre-work  
- Kahoot! download instructions | - Mnemonic graphic  
- Komen Idaho Montana PowerPoint | 15 minutes |
| **Activation** | Based on mnemonic: **Right Information, Right Action, Right Invitation** -  
**DESIGN NOTE:** The mnemonic is a reference to the “output” of the conversation instead of the “input”, so “tone” is omitted.  
**Link Right Information** with Instructional Aid pre-training work:  
1. Apply gamification with Kahoot! to guide volunteers to recall and explore what they read on the Instructional Aid (the advance organizer) prior to this training and relate it to their experience with answering questions during real race events.  
**Link Right Action** concept to volunteers’ experiences:  
1. Discuss their current understanding and performance for answering questions.  
2. Discuss what happens when the volunteers cannot answer questions.  
3. Explain the components of the task that will be discussed further during the session to increase confidence and effectiveness:  
   - Understanding the tone of the questioner  
   - Providing an answer when the volunteer knows the information  
   - Knowing what to do when the answer is not known  
   - Calling the questioner to action for the cause  
**Link Right Invitation** to their experiences:  
1. Ask volunteers questions to get them thinking about how they currently talk to people about donating and participating - how they make that invitation now if they do.  
*Design note: Kahoot! is not a testing tool, it is a contest-based interactive tool for use in discussions during facilitated learning. It will be used to generate participation as the instructor activates prior knowledge and connects to learning.* | | |
**Demonstration**

**Demo 1:** Play a video of conversation skits showing volunteers answering questions at race events. Pause at critical points - *Right Information, Right Action, Right Invitation* - to show exemplary performances for showing how the volunteer applies the mnemonic for responding correctly to tone, answering questions accurately, deciding whether to answer or escalate and using the proper process to do so, and encouraging "call to action."

**Demo 2:** Instructor role-plays with a willing participant focusing on critical points - *Right Information, Right Action, Right Invitation*. Instructor provides reflection of the processes they used to address the question. As the instructor answers, he/she makes thinking visible. "These things are going through my mind at this point..." “I notice...” “So, I respond...” Through addressing Right Information, Right Action, Right Invitation, this technique will highlight critical, difficult, and complex areas of the task.

**Demo Comparison:** Use the provided rubric to discuss and compare the demonstrations. This serves a joint purpose of showing volunteers how to use the mnemonic and rubric during training for discussing role plays.

| Application | a. Number of practices: 4  
Number of **Formative** Assessments: 2  
Number of **Mastery** Assessments: 1 (see Appendix C)  
| b. Practices:  
**Practice 1:** Volunteers listen to and answer five questions (i.e., Where do the donation dollars go?) Instructor guides focus to identification of questioner’s tone and accuracy of answers. Instructor uses error-detection during this practice. A post-practice discussion includes feedback, as well as brainstorming on how to incorporate a “call to action.” Utilize the scaffolding of making thinking visible throughout this practice.  
**Practice 2:** Volunteers listen to five slightly more complex questions (i.e. If I donate $500, how much of that money goes to national research?) Instructor focuses coaching on the decision of whether to provide an accurate answer or escalate the question. Answer accuracy and “call to action” remain important behaviors that will be discussed in the delayed feedback, however, the main focus in this practice will be the decision to answer or escalate.  
**Formative Assessment 1:** Delayed feedback will utilize the rubric to provide a knowledge benchmark. Brainstorm how to incorporate a “call to action.” Remind volunteers of making thinking visible throughout this practice.  
**Practice 3:** Volunteers listen to five additional questions that are slightly more complex (i.e. How are donation dollars divided up between local and national efforts, and how much money goes to Admin costs?) and identify tone, decide whether to accurately answer or escalate, and encourage "call to action." |

| Instructional Aid from pre-work  
- Rubric for the Formative Assessments  
- Coaching table  
- Mastery Assessment checklist (see Appendix C)  
- Instructional Aid from pre-work (see Appendix A)  
| Video containing conversation skits and critical points  
- Mnemonic graphic  
- Komen Idaho Montana PowerPoint  
| 15 minutes  
90 minutes |

Komen Idaho Montana  
47  
Eisel, Lamkins, Orr, Wright
escalate based on tone, and either answer or execute correct escalation process. A post-practice discussion will provide feedback on the incorporation of the “call to action.”

**Practice 4:** This practice will mirror the performance assessment. Volunteers listen to five complex questions and must role-play their responses to the questions. They must identify tone, decide whether to answer or escalate, and add a “call to action” to support the fundraising goal of Komen Idaho Montana. No coaching or guidance will occur during this practice.

**Formative Assessment 2:** A secondary delayed feedback will utilize the rubric will provide an additional knowledge benchmark.

**Mastery Assessment:** The Performance Assessment will consist of three role plays, which will be initiated by the instructor, conducted individually, and scored per a provided checklist. Each role-play will take 1-2 minutes and the delivery of the results will take 1-3 minutes (for a total of 7-12 minutes).

**Note:** The full form of the Mastery Assessment appears in Appendix C of this document.

c. Describe how the set of application activities aligns with Merrill’s corollaries

**Practice Consistency:**
Volunteers gain authentic “how-to” practice in listening to and answering five questions per practice. Questions are asked aloud to a group of three, mirroring the way a conversation may occur on race day. Stated objectives are answering questions accurately, properly escalating questions that cannot be answered, and adding a call to action to each interaction. These elements are consistent with the training objectives and the type of conversations encountered by the volunteers on race day.

**Diminishing Coaching:**
As per the coaching table, feedback and coaching are gradually decreased through each of the four practices. Control shifts from the instructor to the learner. Input from the instructor is lessened until only delayed feedback is included for Practice 4 and for the Mastery Assessment.

**Varied Problems:**
The volunteers are presented with problems that are diverse and become more complex as the practices continue. The total number of questions that are used during all practices provide an adequate representation of what volunteers might encounter in the workplace. Volunteers also will have enough practice experience to prepare them well for the mastery assessment.
Integration

At the end of the session, each volunteer will share learnings with the class. Instructors will challenge each volunteer to reflect on the following:

- What did they learn during the training that they did not already know?
- What did they feel most confident in (what parts of the task they do best)?
- What is most challenging about the task of answering questions accurately and confidently?
- How will they remember to use the mnemonic *(Right Information, Right Action, Right Invitation)* during a fundraising race?

Integration after the training: (create and watch me) Pre-event role play in-person with the volunteers as a way to reflect and recall skills and maintain skill transfer using the mnemonic. *This also gives them the opportunity to fulfill the Watch-Me corollary.*

Estimated total time

<table>
<thead>
<tr>
<th>Coaching Table</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategy</strong></td>
</tr>
<tr>
<td>Reminder of what is critical, difficult, or complex</td>
</tr>
<tr>
<td>Coaching (error detection and correction)</td>
</tr>
</tbody>
</table>
The feedback will be broken down into several categories: identification of questioner’s tone and meaning, accuracy of response, correctness of escalation, and quality of “call to action”. Emphasis for first practice is on accuracy of answers and identification of questioner’s tone.

The feedback will be broken down into several categories: identification of questioner’s tone and meaning, accuracy of response, correctness of escalation, and quality of “call to action”. Emphasis for second practice is on the correctness of escalation.

The feedback will be broken down into several categories: identification of questioner’s tone and meaning, accuracy of response, correctness of escalation, and quality of “call to action”. Emphasis for third practice will focus on all parts.

### Summary

<table>
<thead>
<tr>
<th>Course Element</th>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Graphics</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Summary</strong></td>
<td>The instructor provides a reminder of expectations for using these new skills (Right Information, Right Action, Right Invitation), and will remind learners of the personal benefits of answering questions more confidently and accurately. Volunteers should begin using their new skills immediately after training and can expect follow-up from their race leaders in the form of the post-training integration activity. There will also be a final request for questions before the session is dismissed.</td>
<td></td>
<td></td>
<td>10 minutes</td>
</tr>
</tbody>
</table>

Total course estimated time = 180 minutes

See Appendix C for Mastery Assessment.

### References

Appendix A
Instructional Aid: Answering Questions about Komen Idaho Montana

As you work with our organization and volunteer at Komen Idaho Montana events, you will become more familiar with the details of our operations and our mission. Be as specific as possible when you answer questions about Komen ID MT. When you don’t know an answer, refer them to the specific area on the website where the answer can be found. www.komenidahomontana.org

Tip: See below for a quick reference of website locations for common information.

Sometimes the question might need more than just an informational answer. If you need backup from a member of the Komen staff or you feel that the question is escalated beyond your comfort zone, follow the instructions below:

1. Take a detailed message including the question, contact info, and a note about the tone of the question.
2. Thank them for the question, and assure them that they will receive follow up
3. Deliver the message to Komen Staff within 4-6 hours. Contact info:
   a. Phone: (208) 384-0013
   b. Email: jweak@komenidahomontana.org

<table>
<thead>
<tr>
<th>Common Questions About How Fundraising Dollars are Spent</th>
<th>Summary Answer</th>
<th>Location on Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Komen is a national organization - how much of my donations stay local?</td>
<td>75% of all money raised stays local to help men and women in Idaho and Montana. 25% goes to the Komen National Research Grant Portfolio to fund lifesaving breast cancer research.</td>
<td>Home » About Us</td>
</tr>
<tr>
<td>If none of the national research money (the 25%) comes back to Idaho or Montana, how does that help me?</td>
<td>Although limited amounts of actual research dollars have come back to Idaho and Montana, the benefits of the research certainly are helping breast cancer patients here. The national research findings benefit EVERYONE in the nation as they are shared nationwide. There is not much research happening in Idaho Montana area, so contributing to the national organization for that purpose helps people in Idaho, Montana, and everywhere.</td>
<td>Home » Community Impact » National Research Grants</td>
</tr>
<tr>
<td>How much of your budget is spent on administrative costs for your Affiliate?</td>
<td>Of the 75% of donations going to the local bucket: ≤ 25% is used for administrative costs. 75% is used for mission driven work such as funding mammograms, diagnostic services, patient financial support and education.</td>
<td>Home » About Us » Komen Idaho Montana Impact</td>
</tr>
<tr>
<td>How much of your research dollars is spent on Metastatic Breast Cancer?</td>
<td>In the most recent grant cycle from the Komen National Research Grant Portfolio, 41% of the research dollars are focused on Metastatic Breast Cancer.</td>
<td>Home » Community Impact » Current Idaho Montana Grants</td>
</tr>
<tr>
<td>How much money has Komen Idaho Montana given to the local community to date?</td>
<td>Since 1995 in Montana and 1999 in Idaho, Komen Idaho Montana has donated over $7.2 million for community grants to fund screening mammograms, diagnostic services, and patient financial support. ~ $320,000/year for over 20 years (20 years is the average of 22 years from MT &amp; 18 years from ID) In that time, Komen Idaho Montana has also donated over $2.3 million to the Komen National Research Grant Portfolio for life-saving breast cancer research. ~ $115,000/year for over 20 years</td>
<td>Home » Community Impact » Current Idaho Montana Grants</td>
</tr>
</tbody>
</table>
## Common Questions About The Structure of the Organization

<table>
<thead>
<tr>
<th>Question</th>
<th>Summary Answer</th>
<th>Location on Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>How much money does your headquarters (SGK Foundation) give you each year?</td>
<td>None. We are an independent Affiliate and our own non-profit. We do not receive money for our headquarters on an annual basis.</td>
<td>Home » Community Impact » National Research Grants</td>
</tr>
<tr>
<td>How is your Affiliate different from the national (SGK Foundation) organization?</td>
<td>We are an independent nonprofit organization that has an Affiliation Agreement with Komen national to operate as part of their organization.</td>
<td>Home » Community Profile</td>
</tr>
<tr>
<td>When there are national breast cancer fundraising campaigns organized by other for-profit companies/corporations (like Yoplait or American Airlines), does that money go to the local Affiliate or to the national SGK Foundation organization?</td>
<td>Each program (fundraising campaign?) is different and has various payout amounts for local Affiliates. Typically, the local Affiliates have to support the program through marketing, event attendance, etc. in order to receive those payouts.</td>
<td>Home » Community Impact » National Research Grants</td>
</tr>
<tr>
<td>Your CEO makes $700,000 per year, I don’t want my money to fund her.</td>
<td>In fact, our CEO does not make $700,000 per year. None of the money raised in Idaho and Montana goes to fund her salary.</td>
<td>Home » Community Profile</td>
</tr>
</tbody>
</table>

## Sample Statements for Encouraging Donations and Participation

Each time you are asked a question, you should include an encouraging statement with your response. Use one of these samples, or speak about your personal reasons for working with Komen Idaho Montana.

- **Breast Cancer** impacts millions of women nationwide. Most of us know at least one family who has been hurt by the disease. Events like this help to prevent this hardship.

- We can’t find a cure without research, and we have a way to directly fund those efforts. Komen is a large organization that really gets the resources into the right hands! Can you contribute to the research with a donation?

- The more people who are aware of these important resources, the better. These races are a great way to get the word out about the work we are doing at Komen Idaho Montana. Will you donate today and share your experience with your friends and family?
Appendix B

Survey questions and feedback via SurveyMonkey: [https://www.surveymonkey.com/results/SM-32HTRCD78/](https://www.surveymonkey.com/results/SM-32HTRCD78/)

**Q1** How long have you been an active volunteer for Susan G. Komen Idaho Montana?

<table>
<thead>
<tr>
<th>Answer Choices</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-3 months</td>
<td>0.00%</td>
</tr>
<tr>
<td>3-6 months</td>
<td>14.29%</td>
</tr>
<tr>
<td>6-12 months</td>
<td>0.00%</td>
</tr>
<tr>
<td>1-3 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>3-5 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>5-10 years</td>
<td>21.43%</td>
</tr>
<tr>
<td>Over 10 years</td>
<td>21.43%</td>
</tr>
</tbody>
</table>

**Q2** On a scale of 1-10, what is your confidence level when answering questions regarding funding the Susan G. Komen Idaho Montana (AKA Komen Idaho Montana) organization and where the donation dollars go? (1=Very UNconfident, 5=Neutral, 10=Very Confident)

<table>
<thead>
<tr>
<th>1 = VERY UNCONFIDENT</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 = NEUTRAL</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10 = VERY CONFIDENT</th>
<th>TOTAL</th>
<th>WEIGHTED AVERAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(no label)</td>
<td></td>
<td></td>
<td></td>
<td>28.57%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21.43%</td>
<td>14</td>
<td>7.29</td>
</tr>
</tbody>
</table>
Q3 On a scale of 1-10, what is your confidence level when answering questions regarding the difference between the local Komen Idaho Montana organization and the national Susan G. Komen Foundation in TX? (1=Very UNconfident, 5=Neutral, 10=Very Confident)

Answered: 14  Skipped: 0

<table>
<thead>
<tr>
<th>1 = VERY UNCONFIDENT</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5 = NEUTRAL</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10 = VERY CONFIDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>(no label)</td>
<td>7.14%</td>
<td>0.00%</td>
<td>7.14%</td>
<td>7.14%</td>
<td>14.29%</td>
<td>0.00%</td>
<td>21.43%</td>
<td>14.29%</td>
<td>14.29%</td>
</tr>
</tbody>
</table>

Q4 Type your answer to this question below: “If I donate $500 to Komen Idaho Montana, where does my money go?”

Answered: 14  Skipped: 0

<table>
<thead>
<tr>
<th>#</th>
<th>RESPONSES</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>75% funds locally. 25% goes national for research and education.</td>
<td>10/9/2017 8:48 PM</td>
</tr>
<tr>
<td>2</td>
<td>Research. Education. Screening. Treatment and administration</td>
<td>10/7/2017 2:32 PM</td>
</tr>
<tr>
<td>3</td>
<td>About 70 percent stays in Idaho and 30 percent to corporate office which helps with research.</td>
<td>10/4/2017 11:00 PM</td>
</tr>
<tr>
<td>4</td>
<td>$375 stays locally with the affiliate $125 goes to the national research portfolio</td>
<td>10/4/2017 6:06 PM</td>
</tr>
<tr>
<td>5</td>
<td>TO MONTANA AND THE HEAD QUARTERS</td>
<td>10/4/2017 1:00 PM</td>
</tr>
<tr>
<td>6</td>
<td>75% goes to screenings in Idaho and Montana.</td>
<td>10/4/2017 12:20 AM</td>
</tr>
<tr>
<td>7</td>
<td>Money stays local to provide mammograms</td>
<td>10/3/2017 6:20 PM</td>
</tr>
<tr>
<td>8</td>
<td>25% to fund operational costs, 50% local community needs, such as funding mammos, 25% to National Komen</td>
<td>10/3/2017 8:22 PM</td>
</tr>
<tr>
<td>9</td>
<td>75% towards grants and 25% to breast cancer research</td>
<td>10/3/2017 8:17 PM</td>
</tr>
<tr>
<td>10</td>
<td>Komen</td>
<td>10/3/2017 8:11 PM</td>
</tr>
<tr>
<td>11</td>
<td>75% stays local. 25% to National</td>
<td>10/3/2017 6:01 PM</td>
</tr>
<tr>
<td>12</td>
<td>75% stays within the state or coverage area for the affiliate to run breast exams for men and women in need</td>
<td>10/3/2017 4:26 PM</td>
</tr>
<tr>
<td>13</td>
<td>30% to aid local ppi for mammograms, treatment, etc. other to admin fees (guessing)</td>
<td>10/3/2017 4:20 PM</td>
</tr>
<tr>
<td>14</td>
<td>75% stays local. 25% research national level</td>
<td>10/3/2017 2:00 PM</td>
</tr>
</tbody>
</table>
Q5 Type your answer to this question below: “How does the local Komen Idaho Montana organization differ from the national SGK Foundation?”

<table>
<thead>
<tr>
<th>#</th>
<th>RESPONSES</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Local funds local grants. National is geared toward research.</td>
<td>10/9/2017 8:48 PM</td>
</tr>
<tr>
<td>2</td>
<td>Helping local people</td>
<td>10/7/2017 2:32 PM</td>
</tr>
<tr>
<td>3</td>
<td>The local organization is &quot;boots on the ground&quot; whereas the national org is more administrative and research oriented.</td>
<td>10/4/2017 11:00 PM</td>
</tr>
<tr>
<td>4</td>
<td>Governance locally they are their own 501(c)3. Focus on grants is different - locally based on their community profile. Nationally focused more on research &amp; policy.</td>
<td>10/4/2017 6:06 PM</td>
</tr>
<tr>
<td>5</td>
<td>Money stays local</td>
<td>10/4/2017 12:20 AM</td>
</tr>
<tr>
<td>6</td>
<td>Were a local non profit involved in helping women in need</td>
<td>10/3/2017 8:26 PM</td>
</tr>
<tr>
<td>7</td>
<td>Komen funds local needs such as funding mammogram, SGK Fund's research for a cure.</td>
<td>10/3/2017 8:22 PM</td>
</tr>
<tr>
<td>8</td>
<td>Local organization works with Idaho Montana communities with a separate review board for grants for those specific communities.</td>
<td>10/3/2017 5:17 PM</td>
</tr>
<tr>
<td>9</td>
<td>We are a local affiliate of the National SGK. So we work locally to raise funds for SGK.</td>
<td>10/3/2017 8:11 PM</td>
</tr>
<tr>
<td>10</td>
<td>Local - grants, education, fund raising, mission. National - manages the affiliates, awards research grants, statements of public policy.</td>
<td>10/3/2017 6:01 PM</td>
</tr>
<tr>
<td>11</td>
<td>The Idaho group helps women in this area with support from HQ</td>
<td>10/3/2017 4:25 PM</td>
</tr>
<tr>
<td>12</td>
<td>Don't know</td>
<td>10/3/2017 4:20 PM</td>
</tr>
<tr>
<td>13</td>
<td>Serves local organizations through grants.</td>
<td>10/3/2017 2:00 PM</td>
</tr>
</tbody>
</table>
Q6 How do you currently obtain answers to the most common questions asked by breast cancer patients, patients’ family members, race participants, donors, and the general public? (Check all that apply)

**Answer Choices**

<table>
<thead>
<tr>
<th>Choice</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Komen Idaho Montana website (<a href="http://komenidahomontana.org/">http://komenidahomontana.org/</a>)</td>
<td>66.67%</td>
</tr>
<tr>
<td>Susan G. Komen Foundation website (<a href="http://ww5.komen.org">http://ww5.komen.org</a>)</td>
<td>41.67%</td>
</tr>
<tr>
<td>Listening to other volunteers’ answers</td>
<td>25.00%</td>
</tr>
<tr>
<td>Volunteering at a different regional Komen foundation</td>
<td>8.33%</td>
</tr>
<tr>
<td>Research done on your own</td>
<td>76.00%</td>
</tr>
<tr>
<td>Made answers up</td>
<td>0.00%</td>
</tr>
<tr>
<td><strong>Total Respondents:</strong> 12</td>
<td></td>
</tr>
</tbody>
</table>

**Other (Please Specify)**

<table>
<thead>
<tr>
<th>#</th>
<th>Other (Please Specify)</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Asking questions to the educator at the local office in Boise</td>
<td>10/7/2017 2:32 PM</td>
</tr>
<tr>
<td>2</td>
<td>Ask questions of the staff.</td>
<td>10/4/2017 11:05 PM</td>
</tr>
<tr>
<td>3</td>
<td>Discussions with the former mission manager and new executive director</td>
<td>10/4/2017 6:06 PM</td>
</tr>
<tr>
<td>4</td>
<td>FROM WORK SINCE I WORK IN THE MAMMOGRAPHY DEPARTMENT</td>
<td>10/4/2017 1:06 PM</td>
</tr>
</tbody>
</table>
Q7 Why should someone donate their time and/or money to Komen Idaho Montana? Write a response that you think would be most effective in getting someone to donate or participate in a Komen Idaho Montana fundraising race.

Answered: 13  Skipped: 1

<table>
<thead>
<tr>
<th>#</th>
<th>RESPONSES</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The money goes towards funding current cancer patients. The money goes towards things like food vouchers, mammograms vouchers and transportation vouchers. It is also granted to businesses that can help with the above options.</td>
<td>10/9/2017 8:48 PM</td>
</tr>
<tr>
<td>2</td>
<td>We need to find a cure</td>
<td>10/7/2017 2:32 AM</td>
</tr>
<tr>
<td>3</td>
<td>Komen has been proven to be effective in providing services to needed clients who might otherwise not receive help especially in rural areas of Idaho and Montana.</td>
<td>10/4/2017 11:05 AM</td>
</tr>
<tr>
<td>4</td>
<td>For donation: 75% of the money raised locally stays here and has a direct impact on the lives of those that you see on a daily basis. For participation: We all have a mother &amp; grandmother, some have sisters, aunts, wives, daughters, friends - somebody you know and love will be impacted by breast cancer (1 in 8) - the time you spend now will help someone's person (if not your own). In addition, to women, men too get breast cancer and often are in support role - helping spread those messages are important.</td>
<td>10/4/2017 6:06 PM</td>
</tr>
<tr>
<td>5</td>
<td>BECAUSE THERE ARE MANY WOMEN WHO HAVE NO INSURANCE SO THEY DO NOT HAVE MAMMOGRAMS DONE</td>
<td>10/4/2017 1:06 PM</td>
</tr>
<tr>
<td>6</td>
<td>The local office helps women who are just diagnosed with anything they need. They also help women in the most rural parts of the states. Most of the money stays here.</td>
<td>10/4/2017 12:20 AM</td>
</tr>
<tr>
<td>7</td>
<td>Because its a great organization that needs more voices reaching out</td>
<td>10/3/2017 8:26 PM</td>
</tr>
<tr>
<td>8</td>
<td>The Komen organization helps to find prevention strategies and fund research for a cure.</td>
<td>10/3/2017 8:22 PM</td>
</tr>
<tr>
<td>9</td>
<td>75% of the money raised stays local to assist breast cancer patients and screenings for uninsured and underinsured women</td>
<td>10/3/2017 8:17 PM</td>
</tr>
<tr>
<td>10</td>
<td>Bring awareness to breast cancer diagnosis and treatment. Advocate for those with breast cancer.</td>
<td>10/3/2017 8:11 PM</td>
</tr>
<tr>
<td>11</td>
<td>Komen is working on the Big Bold Goal to reduce breast cancer deaths by 50% in 10 years</td>
<td>10/3/2017 8:01 PM</td>
</tr>
<tr>
<td>12</td>
<td>We all need to help our fellow man. What better way to start than in your own home town</td>
<td>10/3/2017 4:20 PM</td>
</tr>
<tr>
<td>13</td>
<td>It directly helps the uninsured/under insured in our local area.</td>
<td>10/3/2017 2:00 PM</td>
</tr>
</tbody>
</table>

Q8 How do you currently escalate questions if you do not know or are unsure of the answer? (Check all that apply)

Answered: 14  Skipped: 0

**Answer Choices**

<table>
<thead>
<tr>
<th>Answers</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Komen Idaho Montana staff (via text, phone, &amp; or email)</td>
<td>86.71%</td>
</tr>
<tr>
<td>Direct them to a particular page on the Komen Idaho Montana website</td>
<td>42.86%</td>
</tr>
<tr>
<td>Refer them to another volunteer</td>
<td>14.29%</td>
</tr>
<tr>
<td>Give them Komen Idaho Montana staff's contact info</td>
<td>21.43%</td>
</tr>
<tr>
<td>I don't escalate</td>
<td>7.14%</td>
</tr>
</tbody>
</table>

Total Respondents: 14
Q9 What is the most challenging question you have ever been asked in regards to the funding or services of either the local Komen Idaho Montana organization or the national SGK Foundation?

Answered: 11  Skipped: 3

<table>
<thead>
<tr>
<th>#</th>
<th>RESPONSES</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Questions about why we fund Planned Parenthood. Also questions about how staff gets paid when this is a nonprofit organization.</td>
<td>10/9/2017 8:48 PM</td>
</tr>
<tr>
<td>2</td>
<td>People have said they have called for help and the foundation was not able to help them, why wasn't I helped?</td>
<td>10/7/2017 2:32 PM</td>
</tr>
<tr>
<td>3</td>
<td>What is Komen's position as it relates to planned Parenthood.</td>
<td>10/4/2017 11:06 PM</td>
</tr>
<tr>
<td>4</td>
<td>Specific questions about treatments or facilities that have mammography (if I don't have the map) or facilities that have treatment options.</td>
<td>10/4/2017 6:06 PM</td>
</tr>
<tr>
<td>5</td>
<td>N/A</td>
<td>10/4/2017 12:20 AM</td>
</tr>
<tr>
<td>6</td>
<td>Why the founder can afford expensive jewelry when she's not making a lot of money</td>
<td>10/3/2017 5:26 PM</td>
</tr>
<tr>
<td>7</td>
<td>N/A</td>
<td>10/3/2017 8:22 PM</td>
</tr>
<tr>
<td>8</td>
<td>Why did eastern Washington discontinue their Komen affiliate?</td>
<td>10/3/2017 8:17 PM</td>
</tr>
<tr>
<td>9</td>
<td>Lots of questions if the funds raised stay local</td>
<td>10/3/2017 6:01 PM</td>
</tr>
<tr>
<td>10</td>
<td>N/A</td>
<td>10/3/2017 4:20 PM</td>
</tr>
<tr>
<td>11</td>
<td>Where does the money go national?</td>
<td>10/3/2017 2:00 PM</td>
</tr>
</tbody>
</table>
Q10 What do you think you are missing to be able to answer questions accurately and deliver in a more confident manner?

Answered: 14  Skipped: 0

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>More information like a Frequently Asked Questions (FAQs) list with correct answers</td>
<td>42.86%</td>
</tr>
<tr>
<td>A volunteer website where questions and answers can be discussed</td>
<td>28.57%</td>
</tr>
<tr>
<td>Developing more confidence when talking to people</td>
<td>7.14%</td>
</tr>
<tr>
<td>Scenario &amp;/or explanatory videos</td>
<td>0.00%</td>
</tr>
<tr>
<td>Monthly volunteer meetings to discuss common questions and learn from others</td>
<td>7.14%</td>
</tr>
<tr>
<td>Role playing with other volunteers</td>
<td>0.00%</td>
</tr>
<tr>
<td>Mentoring with more senior volunteers</td>
<td>0.00%</td>
</tr>
<tr>
<td>The ability to multitask (i.e., answering questions in the middle of performing a task)</td>
<td>7.14%</td>
</tr>
<tr>
<td>Not missing anything</td>
<td>0.00%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>7.14%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>14</td>
</tr>
</tbody>
</table>

# OTHER (PLEASE SPECIFY)                  DATE
1  Fyi this question I can’t check all that apply so I’ve entered my thoughts here: scenarios/explanatory videos, FAQs, volunteer website  10/4/2017 6:06 PM
Appendix C
Instructional Plan: Mastery Assessment

Instructions for Instructor:

Setup:
● Prepare a blank assessment of the online Assessment Checklist for each volunteer.

Facilitation:
● Explain the instructions for the assessment to the group as a whole:
  o The volunteers will be asked to role-play three scenarios and will play the part of volunteer for each.
  o The role-plays will happen consecutively.
  o They will not have resources outside of the conversation and should not have any instructional aids on hand.
  o The volunteers should respond to questions and perform the role play as if they were at a real race event. They should not use phrases like “I would say…” or “I would tell them to…”
  o The volunteers are scored and given results immediately after the assessment has ended.
● Break the volunteers into breakout rooms so that the assessment is done individually.
● Use the provided scenarios to evaluate skills and use the assessment checklist to score the performance.
● After all three scenarios are complete, compute the results and deliver score to the volunteer. Let them know that further feedback and coaching will be available post-training.
● When the training is over, email the results of the assessment (the completed checklist including the comments section) to the volunteer.

Scenario 1:
1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:
   “We are at a race and the main event has not started. You are stationed in the sign-in area, directing attendees to the appropriate locations to check in. You are stopped by me – an attendee who will be running in the event. I smile and say ‘excuse me’ as I gain your attention.”

   1. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role play by asking the initiating question from the perspective of your character profile (below).

   1. Stay in character throughout the role play.

Character profile:
● Your tone is neutral. You should display curiosity (not hostility) as you ask the question.
● You take the answers of the volunteer at face value – you do not respond with further critical questions.

Question profile:
● “My team has been working on our race donations for weeks. I know that it helps people with breast cancer, but what exactly do you guys use the money for?”
● This question should not require escalation to the staff and should only be escalated to the website if it cannot be answered by the volunteer.
Scenario 2:

1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:
   
   "We are at a race and the main event is in motion. You are stationed near the finish line for the race, arranging the water station and waiting for runners to start finishing the race. There is a crowd of spectators – attendees who are associated with the runners but are not racing themselves. I approach you by myself. I have my arms crossed, am not smiling, and am making direct eye contact."

2. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role play by asking the initiating question from the perspective of your character profile (below).

3. Stay in character throughout the role play.

Character profile:

- Your tone is neutral. You should display curiosity and some skepticism (not hostility) as you ask the question. You are polite but not overly friendly.
- You should seem skeptical of the donation and fundraising structure. You have a general distrust of how non-profits work but no open hostility towards Komen Idaho Montana.

Question profile:

- "I've been to a few of these races already and I feel like I see that Komen logo all over the place. I'm sure it's a good cause, but I don't see how giving all this money to some big charity is going to help us here in Idaho. I want to be able to donate locally. Can I guarantee that a check I write to you guys will support the people in this community?"
- The volunteer may decide to give some information on how funds are distributed, but they will not be able to answer the question about directing specific funds to specific places. This question should require escalation to the staff to provide the questioner more information for his potential donation.

Scenario 3:

1. Give the volunteer the details of the race event environment by reading the following statement before entering role-play mode:

   "We are at a race and the main event is in motion. You are stationed near the finish line for the race, arranging the water station and waiting for runners to start finishing the race. There is a crowd of spectators – attendees who are associated with the runners but are not racing themselves. I approach you with a friend and my body language is closed. My arms are crossed and I seem irritated."

2. Ask the volunteer if they understand the scenario or if they need it to be repeated. Once you have confirmed understanding, begin the role play by asking the initiating question from the perspective of your character profile (below).

3. Stay in character throughout the role play.

Character profile:

- Your tone is hostile. You should maintain an inquisitive tone throughout the role play.
- You should seem skeptical of the donation and fundraising structure. You clearly have a problem with the association of Komen with Planned Parenthood, and those feelings will not be changed based on this conversation.
Question profile:

- “Hi, I need you to help me with something my friend and I are talking about. She said that Komen funds Planned Parenthood, which I didn’t know. I wouldn’t be donating if I thought that my money was going there. Is that true?”

- The volunteer may decide to give some information on how funds are distributed, but they will not be able to answer the question about directing specific funds to specific places. Additionally, this presents an opportunity for a negative perception of the organization to be changed. This question should require escalation to the staff to provide the questioner more information about this question.

Assessment Checklist

<table>
<thead>
<tr>
<th>Volunteer’s Name:</th>
<th>Practice 1</th>
<th>Practice 2</th>
<th>Practice 3</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Check the box if the criteria are met.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Objective 1: Answer questions

The answer is accurate. *(No inaccurate information was given, even if the question could not be answered completely or without escalation)*

The answer is provided immediately if the volunteer knows the answer. The escalation source is given immediately if they do not.

The unanswered question is escalated to the correct source:
- A specific location on the Komen Idaho Montana website
- Or
- A member of the Komen Idaho Montana staff

Objective 2: Encourage questioner to get involved

The race volunteer thanks the questioner for their interest.
The race volunteer provides a relevant fact or statement that fulfills one or more of the following criteria:
- Shows value of fundraising through an example of how donated funds are used.
- Shows importance of the fight against breast cancer.
- Shows personal connection to the cause with an anecdote.

The race volunteer explicitly asks for the questioner’s continued involvement (either participation or donation) in the Komen Idaho Montana cause.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>←Total the checks in each column and enter here.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add all the checks together, and enter total here→</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pass=5</td>
<td>Pass=5</td>
<td>Pass=5</td>
</tr>
<tr>
<td>←Write Pass/Fail according to scoring criteria here→</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pass=15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>