# Tackle Training Tactfully

**Resource Type:** Articles

**Topic:** HR Risk and Employment Practices

All employees will, at some point, encounter occasions when they need to learn or adapt their skillset to succeed in their role. Workplace training and cross-training enable staff to gain the necessary proficiencies to perform their duties while contributing to the organization. Strong training programs aid in risk mitigation, increase employee engagement, raise retention rates, and encourage innovative thinking. According to a recent survey by Lorman, 74% of employees are willing to learn new skills, but 59% of staff claim they had no formal workplace training and that most of their skills were self-taught.

Consider these typical employment situations:

- A direct service staff member is promoted to a supervisor or manager position without receiving training on how to provide performance feedback to staff or how to handle interpersonal conflicts.
- An individual's role has expanded beyond what the person was initially hired to perform, and that person needs to learn new skills to complete the job function correctly.
- The organization develops a new role and lacks an onboarding process that covers the position's responsibilities.
- A staff member must take an unexpected leave of absence. Their essential duties are delegated to several other individuals throughout the organization, some of whom might be unfamiliar with a different department's processes and procedures.

Training programs can significantly reduce the risk of frustration, turnover, and disengagement in all these scenarios. Nonprofit leaders who use staff training effectively can make transition moments an opportunity to advance the ambitious missions of their organizations.

Training nonprofit staff should not be a one-size-fits-all program. Instead, organizations can look to their internal resources—existing procedures, trainings, and employee expertise—to enhance the nonprofit's training program.

## Take Hold of Your Training

Below we explore several ways organizations can leverage their existing talent pool to amplify their internal training program leading staff to develop new skills, increase engagement, and find new ways to approach risk management.

**Map out the top responsibilities for each employee**. Ask each team member to identify their top 10 to 25 critical tasks and responsibilities. Staff should revisit these responsibilities annually to capture changes as your organization grows and evolves. Capture these core functions in a document or software solution—shared with your entire team—that identifies others in the organization trained to handle the task and your plan to close gaps in this process. This could be as simple as creating a document or spreadsheet, or you could leverage an existing software solution to manage the data. Below is a sample using a Director of Finance role.

| Critical Task | Backup staff or contractors trained to do this and prepared to step in | Plan to fill gaps, including deadlines |
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| Review contracts submitted by the program team before execution; focus on key provisions such as indemnification, scope of work, and insurance requirements | 1st: Senior Accountant<br>2nd: External Legal Counsel | Deliver a contract review workshop to at least 2 members of the Executive Team by 12/31 |
| Review draft monthly financial statements and prepare a summary memo for the Treasurer and Finance Committee | 1st: Senior Accountant<br>2nd: Deputy Executive Director | Train the entire finance team on the mechanics of preparing the monthly summary memo for Finance Committee review<br><br>Allow each team member to draft one memo during the next six months; provide feedback and suggestions on the drafts |

**Consider which duties are most time-consuming for each role**. Now that the document has been created, convene your team to share and discuss the grid. Use this file as a basis of discussion among your team to determine which of these tasks consume the most time and discuss ways to increase the other staff members' knowledge about how to perform these tasks. This also creates an opportunity to re-distribute responsibilities based on each person's workload or interest in professional growth and ensure coverage should a business interruption occur.

Remember, this should not be an insular activity that only takes place within one department. It is good to begin this process within a team that works closely together and then share the grid more widely. In fact, this gives leaders another peek into how cross-functional teams may work better together by leaning into each other's strengths and areas for growth potential.

**Create opportunities to shadow others in your organization**. Getting to see what someone else does with their day or how they approach a particular critical task is an excellent way to teach employees a new skill. It provides the learner with an opportunity to ask questions about the approach and gives the teacher a chance to gain a deeper understanding of what they are doing. Both parties can learn from each other as the student may tackle the task from a different perspective that could enhance the process while providing the instructor with ideas to evolve their own problem-solving techniques used every day.

**Construct a framework for cross-training staff**. The training framework should act as a guide and starting point for teams and leadership as they navigate how best to train others and how to find ways to create advancement opportunities within the nonprofit. This development can help employees grow and feel more engaged in their contributions to the organization.

When constructing your training framework, consider what you want the training program to accomplish. Is it designed to bolster your business continuity planning, increase employee satisfaction and retention, meet a compliance or other legal mandate, or something else?

Questions you may want to ask as you are considering how to get the most from training include:

- How often should the training occur? The frequency could differ based on the complexity of what you want staff to learn.
- Should the training session be one-on-one, small groups, a large cross-section, or a combination?
- What hands-on elements could be added to the training to make it more robust?
- Does the training incorporate individuals who would not typically be considered a backup for a particular critical task?
- What feedback opportunities are provided for both the trainer and learner?

**Segment learning into bite-size chunks**. Individuals process and retain information better in smaller amounts. According to *The American Journal of Medicine*, the average attention span of adult learners is only around 10-15 minutes. Employee attention can be re-engaged by relating the content directly to the individual's goals and objectives. However, to maximize learning, keep the training times short and increase the frequency.

This strategy magnifies retention and allows for an opportunity to revisit and practice what was previously discussed.

### Make Your Training Buy-In Bold

As employees list out their core responsibilities—typically, what was part of their original job description—encourage them to explore what else they are doing that may fall in other categories. Diving into these ‘other duties as assigned’ tasks opens the gateway for informal cross-training possibilities that could:

**Broaden staff’s network**. As individual employees begin working on something outside their usual role, they are exposed to a new set of co-workers, managers, and customers. The enthusiasm that comes from exploration is reflected in the individual’s team spirit and ability to learn a new skill quickly. This builds that person’s reputation within your nonprofit and broadens their network.

**Transmit new skills**. Formal training opportunities can be very costly, and not all organizations have the budget to cover them. Each team member has a set of well-honed skills about areas of your nonprofit. Take advantage of this knowledge by having employees teach each other. Utilizing internal talent will allow other employees the chance to expand their understanding of your nonprofit while increasing their skill set.

**Build on an interest area**. Perhaps a staff member has been interested in trying out something new like fundraising, how benefits are administered, or organizing special events your nonprofit hosts. Giving the employee a chance to participate in special projects within your organization provides them the opportunity to learn more about the realities of that position and decide if it really would be a good fit for them.

Successful training initiatives are intentional efforts that often involve cross-collaboration throughout the entire organization. Cross-training staff is a proven strategy to minimize the painful consequences of unplanned departures. It’s also a wonderful way to help valued staff build new skills and knowledge about the functions and tasks that bring a nonprofit’s mission to life. Investments in skills training are well worth the time and financial resources required to make them happen.

### Additional Reading


- Gurchiek, Kathy. Training: Don’t Forget Your Deskless, Night and Weekend Workers. (November 9, 2021). SHRM
- Zeidner, Rita. The Reskilling Imperative. (August 31, 2021). SHRM