

Cross-Training in Small Governments: What is it & why does it matter?

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GFOA Small Government Forum*



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Speakers

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Agenda

1. Overview of Employee Cross Training

Objectives:

- Establish what cross-training is
- Determine why cross-training is important for small governments: benefits to employer and employee
- Identify some of the potential downsides to cross-training and ways to overcome them

2. Case Study - Vallejo Flood & Wastewater District

Objectives:

- Discuss the case studies' challenges, risks, and benefits associated with cross-training

3. How to Start Cross Training

Objectives:

- Review the most common methods for cross training, and the first steps in getting cross training started in your small government (or anywhere)



What is Cross-Training?



What is Cross Training?

- ❖ It “involves teaching an employee who was hired to perform one job function the skills required to perform other job functions.”
- ❖ Teaching “your” employees the skills and responsibilities of another position at your company to increase their effectiveness.
- ❖ “Cross-training programs are a way to more formally organize the process of getting employees prepared to be able to do more than a single job.....offering a wide variety of benefits for businesses.”



Sources: Inc.'s encyclopedia entry on cross-training.
<https://www.entrepreneur.com/encyclopedia/cross-training>

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Poll Question #1

- Does your organization do some type of employee cross-training currently?
 - Yes / No



Why is Employee Cross Training Important for Small Government?



Why is Employee Cross Training Important for Small Government?

IT'S MUTUALLY BENEFICIAL!!!!!!

❖ Stability/Durability:

- Employees from other departments/groups can pitch in when an unknown situation arises.
- Employer's risks are reduced during turnover situations.

❖ Efficiency:

- Employees learn where their role fits into the organization.
- Employees have a better understanding of how work flows especially when things are viewed more holistically (and not siloed).
- Employees have a better perspective for spotting opportunities for process improvement.
- Employer saves money spent on recruiting and hiring new talent.





Why is Employee Cross Training Important for Small Government?

❖ Value:

- Improves chances of uncovering hidden talents in leaders already present within an organization.
- Employees learn a variety of skills relevant to the company; especially if learning is linked to their interests.
- Enhances employee productivity and engagement.

❖ Teamwork:

- Increases cooperative work environment driven by teamwork and greater understanding of diverse skill sets, workflows, and workloads.
- Boost morale.

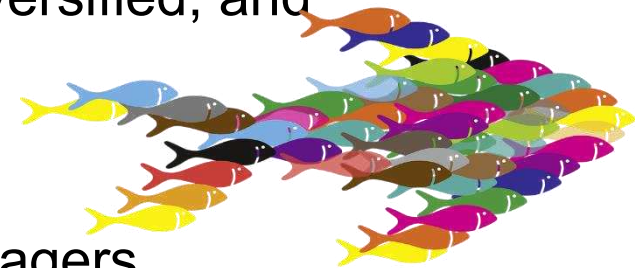
❖ Citizen-/Customer-focused:

- Focus of these programs is ultimately about serving the customer/citizen better (civic responsibility).



Employee Benefits

1. Increased chances for promotion and better pay
2. Higher rates of job satisfaction, job security, and engagement (you can measure these)
3. Opportunities to learn new skills, become diversified, and remain competitive in the job marketplace
4. More motivation to complete work
5. Better relationships with coworkers and managers
6. Better understanding of the strategic initiatives and how jobs/departments are inter-connected
7. Decreased rates of employee turnover, absenteeism, and presenteeism



Others: *Type in the Chat*



***What are some of the Potential
Downsides to Cross-Training?***



Potential Downsides to Cross-Training: For Your Consideration

1. It's important to discuss and consider the various downsides, including that this is *NOT a one size fits all type of program/approach*.
2. *Engage your employees pre-development, and at every stage to ensure successful implementation. Growing pains are expected!*
3. Not all employees want to perform jobs they weren't hired for, and a compulsory cross-training program can lead to:
 - ❖ employee resentment,
 - ❖ burnout,
 - ❖ poor morale,
 - ❖ dissatisfaction,
 - ❖ unhealthy competition, and/or...
 - ❖ loss of focus.





Potential Downsides to Cross-Training:

Dissatisfaction and Burnout

1. Employees might take it the wrong way if someone new is brought in to learn their job or take on some of their responsibilities. A natural conclusion could be that they aren't doing their job well.
2. If this individual is a solid performer, you could risk losing their natural level of job performance.
3. Employees might see it as having additional responsibilities piled onto them for no additional compensation.





Potential Downsides to Cross-Training: Competition and Employee Resentment

Could Lead To:

- ❖ Unhealthy competition in the workplace.
- ❖ Employees feeling as if their jobs are being threatened, and may to unethical extremes to make sure they keep their position.
- ❖ Gossip circulating around the office.
- ❖ Employees putting personal problems above their work.
- ❖ Employees possibly sabotaging work and/or not providing in-depth information needed for others to successfully become cross-trained.



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Potential Downsides to Cross-Training: Loss of Focus

- ❖ Cross-training requires balancing the importance of deep, specialized knowledge with being a jack-of-all-trades.
- ❖ There may be a place in your organization for both types of employees, but it's not necessarily the case that everyone should be cross-trained.

***How do you decide on the employees who want to be cross-trained?
(Type in the Chat)***





Ways to Overcome the Downside(s) to Cross-Training:

Ways to Overcome	Dissatisfaction/ Burnout	Competition/ Resentment	Loss of Focus
1. Task ID –designate necessary tasks others can perform well.	X	X	
2. Voluntary Participation – employees with interest.	X	X	X
3. Specialized Skills –limit involvement of those with highly specialized (degreed) skills.	X	X	X
4. Coaching – apply coaching techniques.	X	X	X
5. Reduce Workload – during training and while other tasks are being performed.	X	X	X
6. Recognize and/or Reward – with new skills and/or responsibilities. Acknowledge!	X	X	
7. Employee Development Plan – incorporates cross-training.	X	X	X



Case Study: Vallejo, CA Flood and Wastewater District



Vallejo Flood & Wastewater District

California

Population **123,073** | Agency size **90 employees** | Finance **7 employees**

Presented by:

Chas Ann Fadrigio, Finance Supervisor





BACKGROUND

Risk Assessment

- Silos – *Task focused. My work. My goal.*
- Small picture – *How* but not the *Why?*
- Holes – *Limited exposure and opportunity*
- Job Contentment – *“Past performance reviews indicate that I do enough and I have no desire to learn other things.”*



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BACKGROUND

Risk Impacts:

- Business Disruptions
 - *Minimal coverage and Succession planning*
 - *Issues escalate up the chain*
- Crockpot in a Microwave world
 - *Inefficiencies*
 - *No time to cross-train*
- Costly
 - *Outdated systems and compliance risks*
 - *Need for overtime and consultant help*



outdated

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UNDERSTANDING ROLES

- What are the *roles* of the department?
- Who is *responsible* for the role?
- What is included in the *job description*?
- What is *their understanding* of the role?
- Do they see how the roles are *connected*?

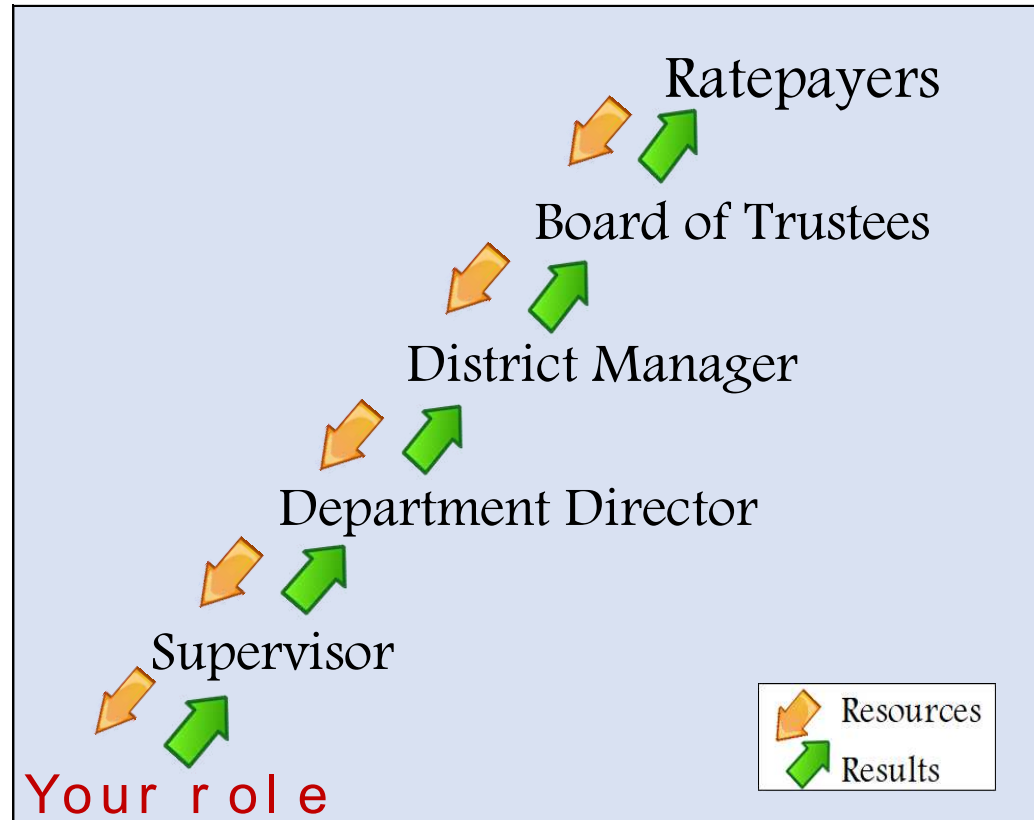


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EXPECTATIONS

- Shift the focus *from* the Individual *to* the Role
- Resources are *provided* to each role, what are the *expected* Results?
- *Pan in-and-out* of the *job description*





BUILDING THE FRAMEWORK

- Tie each Role to the Big picture
- Discuss the “with” and “without”
- Utilize policies, regulatory requirements, recommended best practice, memorandum of internal controls reports, GAAFR, etc.
- Trace their transaction all the way to the CAFR and other reports
- Use real statistical information when discussing benefits and risks
- Be open to sharing your own experiences, strengths and weaknesses
- Tie each Role to the Big Picture *(yes, I repeated this)*





TWO-WAY COMMUNICATION

Rinse, Wash & Repeat

- 1) *Listen, Learn, Acknowledge and Provide feedback*
- 2) *Share, Educate, Identify and Seek feedback*



Commit to Communicate

- ✓ *Regular check-ins, timely responses, take good notes, and learn what is most effective for the individual*

Safety proof

- ✓ *Focus on the Roles and Goals*
- ✓ *Praise publicly, Address privately*

Model it

- ✓ *Ask, don't assume*
- ✓ *Be Authentic. Be Respectful.*



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OVERCOMING DOWNSIDES

A few things that really worked:

- ☐ Add Perspective - *Why is this valuable and who relies on it?*
- ☐ *Plan* with the Trainer. *Plan* with the Trainee. *Plan* to succeed.
- ☐ Depressurize – *Remove responsibility and Acknowledge progress*
- ☐ Anticipate and Discuss the curves ahead – *Less overwhelming*
- ☐ Emphasize the Value of each Role – *You need them. They need you.*
- ☐ Promote Collaboration – *Increased Communication and Appreciation*
- ☐ Accountability- *Acknowledge your own role and responsibility*



REALIZING THE BENEFITS

Cross-trained staff		
Functions	Before 6 EE	Today 5 EE
Customer Service	3	5
Ordinances and Rates	2	5
Annual service charge calculation	1	5
Accounts Receivable	1	2
Cash Monitoring	2	3
Bank reconciliations	2	4
Receiving	1	4
Purchasing	1	3
Accounts Payable	1	3
Payroll	1	3
Inventory	1	4
Capital	2	3
Budget Preparation	2	5
Budget Monitoring	2	5
Journal entries	2	4
Monthend Close	2	4
Yearend Close	2	4
Interim and Final Audit	2	4
Single Audit	1	2
CAFR Preparation	2	4
Coverage	29%	80%

* Excludes Director of Finance/Treasurer

Increased:

- Knowledge & Skills
- Internal controls
- Ownership & Initiative
- Awareness of roles

Decreased:

- Business disruption (COVID-19)
- Upward escalation
- Customer complaints
- Overtime & Consultant help

Improved:

- Teamwork & Collaboration
- Communication & Relationships
- Policies & Procedures
- Quality record keeping

Timelier:

- Response & Delivery
- Reconciliations & Closings
- Reporting



THINKING beyond

Budget Education, Accountability & Monitoring (BEAM) 12-month program

Cross-training across the organization

Goals

- ✓ Reinforce Finance staff cross-training
- ✓ Educate **Organizational Leaders** on all aspects of VFWD budget
 - ✓ Raise the Level of Financial **Accountability** districtwide
 - ✓ Improve **Transparency** & Reporting
 - ✓ Support **Succession** Planning initiatives
- ✓ Improve **cross-departmental** communication & collaboration
- ✓ Select new ERP system that **integrates** and **serves** the needs of all District **departments** and **functions**



Poll Question #2

Lack of cross-training in our organization is due mostly to:

- A. Work demands do not allow time to cross-train
- B. As normal practice we rely mostly on manuals or SOP's
- C. Employee job contentment or pushback
- D. Skills do not align with functions where cross-training is needed
- E. All of the above



An Introduction to Cross-Training Methods



An Introduction to Cross-Training Methods

1. Cross Training Across Departments
2. Cross Training Different Functions, Roles or Complete Jobs
3. Cross Training Skill Sets

You can use one or more of the types of cross-training listed above to develop a more well-rounded staff who will also be your future leaders.



Cross Training Across Departments

- ❖ One of the best ways to build a real sense of teamwork and better relationships across your organization, is to allow employees to literally walk in someone else's shoes for a while.
- ❖ It builds a better sense of understanding across departments which will improve communications.
- ❖ It also helps employees better understand their current roles in relation to the entire organization, while giving them opportunities to learn more about other teams and departments.
- ❖ **How To:**
 - Have employees shadow someone in a different department so they understand the scope of work the other department is responsible for daily, especially when the departments' operations are directly linked.
- ❖ **For example:**
 - Have your building inspectors understand what billing specialists do, and have your marketing team learn more about the court clerk roles, etc.



Cross Training Different Functions, Roles or Complete Jobs

- ❖ A well-structured cross-training program could entail employees executing different job roles over the course of a few months at a time as they rotate through different roles.
- ❖ Develop programs that allow employees to see what leadership within their own department is like or....
- ❖ Allow employees to discover whether they'd rather be a general billing specialist, a budget analyst, or a specialist who handles billing disputes within the finance department.
- ❖ **For example:**
 - Someone who wants to know everything there is about marketing might act as a media planner for your organization for a few months and then rotate on to a different marketing role available in your organization, until they've experienced most of the marketing roles (if feasible).



Cross Training Skill Sets

- ❖ **Upskilling (an underutilized form of cross-training):** promotes a culture of learning across your organization while allowing employees to satiate their own curiosity and discover hidden talents or interests.
- ❖ Enhancing individual skill sets challenges employees, which keeps them engaged and leaves them better prepared to take on more advanced leadership roles with your organization and/or roles that will require a well-rounded background and diverse skill set.
- ❖ **For example:**
 - ❖ You could have employees from across your organization learn the ins and outs of business writing.
 - ❖ You could have all employees learn the same platforms and systems your organization uses to alleviate confusion and backlogged work that only a handful of people can currently do.



Poll Question #3:

What Cross-Training Methods Might Work Best for Your Agency?

- A. Cross Training Skill Sets (across skills)
- B. Cross Training Across Departments
- C. Cross Training Different Functions, Roles or Complete Jobs
- D. Some Hybrid or mix of A, B, and C.



How to Start Cross Training?

- ❖ Start the Conversation: What type of method would your government start with?
- ❖ What tasks/job functions are highest priority/need coverage?
 - ❖ Deadlines.
 - ❖ Departmental goals.
 - ❖ Customer-focused.
- ❖ Job incumbents can clean-up (or write) processes and/or procedures for future training.
- ❖ Identify people who are good candidates for cross training.
- ❖ Identify skill sets and areas of interest.



Questions?



Sources

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Bonus Material from BOLD, LLC:



Ideal Rewards and Recognition Assessment

You have done something really well at work and worthy of recognition. The list below contains tangible ways in which you could be rewarded. Please select up to five options that you would value the most. Note that not all of these rewards are currently available and may not be feasible to offer in the future, but we are wanting to gauge what rewards are valued the most by our employees.

- | | |
|---|--|
| ☐ Cakes/donuts/sweets | ☐ Healthy food options/snacks |
| ☐ Certificate of achievement | ☐ Late start to your work day |
| ☐ Early finish to your work day | ☐ Lunch or dinner with manager |
| ☐ New equipment/office furniture/software | ☐ Extra vacation day (one day) |
| ☐ Longer lunch breaks | ☐ Gift certificate to restaurant/retail |
| ☐ Bonus (one-time) | ☐ Salary increase |
| ☐ Write-up and/or photo on company social media site | |
| ☐ Donation to not-for-profit of choice/volunteer time for not-for profit | |
| ☐ Team social event | |
| ☐ Other: (please state): _____ | |



Ideal Rewards and Recognition Assessment

Employee Favorites:

What is your favorite?

- Drink:
- Snack:
- Dessert:
- Flower:
- Retail store:
- Sports team(s):
- Fast food restaurant:
- Table service restaurant:
- Other: _____

Bonus Material: *Motivating and Rewarding Different Personality Styles...An Internal Focus*

FEELERS

- Enjoy personal attention from managers and others
- Like being helpful to others around them/who they work withy/customers
- Like hearing about and expressing feelings

Motivate by:

- Praising a good effort
- Allowing opportunities for them to help
- Permitting creative and expressive activities
- Sharing the personal part of your reactions

THINKERS

- Love to be right and hate to be wrong
- Like to take their time to get things done
- Like working with others who appreciate their capabilities

Motivate by:

- Praising completion of work
- Praising thoroughness and detail
- Allowing them to set their own learning and task schedule
- Grouping them with people who appreciate them

Bonus Material: *Motivating and Rewarding Different Personality Styles...An Internal Focus*

INTUITORS

- Love to respond to an intellectual change
- Like to think about important goals and issues
- Need time and breathing space

Motivate by:

- Valuing their creativity by encouraging it in discussions; allowing thinking time
- Allowing them to design their own goals/objectives
- Putting them with people who will value their skills
- Taking the time to talk with them about things that are interesting to them

SENSORS

- Love to take action
- Enjoy taking a leadership role
- Like to start new projects
- **Motivate by:**
- Permitting activities after completion of quiet work
- Praising completion of successful projects/milestones
- Providing opportunities for leadership roles
- Giving specific responsibilities

Bonus Material: Ways to Boost Morale...

Modified/Adapted from 25 Easy and Fun Ways to Boost Morale featured in the SHRM HR Magazine, July/August

2015 (33-38) compiled by Dori Meinert.

- 1. **Let it Grow** - Green-friendly workplaces tend to be high yield environments. A company in Toronto provided its employees with sunflower seeds and a pot to plant them in during winter. When they bloomed, the office was filled with hundreds of colorful flowers.
- 2. **Cool Treats** - Buy popsicles and put them in the company freezer.
- 3. **Volunteer at a Not-for-Profit Together** - Encourage employees to agree on a charity they can all donate time to work on a project such as Habitat for Humanity. It enhances teamwork and provides opportunity for out of office interactions.
- 4. **Easy Sports Tournaments** - Fun way to unwind through friendly competition; fun games, corn hole, volleyball, bocce, etc.
- 5. **Cooking Competitions** – Your choice cooking competition; sample at lunch or when appropriate.
- 6. **Free Food and Fun** - Free staff breakfast or free visit to the ice cream truck for employees.
- 7. **Let the Games Begin** - Provide carnival rides and a dunk tank where management is the target.
- 8. **“TV Fridays”** - Play episodes of a TV show (that everyone likes and is decent) at lunchtime and invite everyone to watch together. Provide snacks that are related to the episode. Ex. Pretzels for the episode where Kramer keeps saying “These pretzels are making me thirsty”.
- 9. **Tee-Offs to Dip-Offs** - Have a themed lunch on the last Friday of every month. Tie it to the month’s biggest sporting event or some other event people have in common.
- 10. **RAK ‘Em** - Encourage Random Acts of Kindness. Simple acts like leaving an apple for a co-worker, a soda or a gift card for a free coffee.
- 11. **Get Hands-On** - Let employees try out an aspect of the company they don’t normally get to experience.
- 12. **Group Activities** - Provide an opportunity for employees to attend cooking classes as a group, or some other activity everyone might enjoy.

Bonus Material: Ways to Boost Morale

- **13. Holiday Contests-** Have a pumpkin carving contest during Halloween; ugly sweater contests in December. Departments are allowed to decorate their areas according to the holiday.
- **14. Accomplishment jars** - Put clear glass jars on employee desks and provide marbles. Colleagues put marbles in each other's jars for accomplishments. At the end of the year hold a raffle. The more marbles you had, the more times your name got thrown in the hat for prizes.
- **15. Take the Afternoon Off** - When an employee has gone above and beyond the call of duty, they can be rewarded with an unexpected Friday afternoon off with pay.
- **16. Movies** - Buy movie tickets in bulk and ask managers to give them out to deserving employees as a reward for a job well done.
- **17. Bingo!** - Create bingo cards with phrases or terms that are commonly heard around the office. As the phrases are heard the bingo card is filled in. Prizes are awarded for those that complete their cards.
- **18. Catch 'em in the Act** - A healthcare company had a great idea called "Getting Caught". They encouraged employees to "catch" their peers when they go above and beyond the call of duty. Both the recognized employee and the person who "caught" him or her would receive a small gesture of appreciation.
- **19. On a Personal Note** - A small hospital asked their directors to hand write thank-you notes to hourly employees whenever they noticed employees going above and beyond their duties. The notes were always handwritten and sent to the home of the employee via the HR dept. Board members could be utilized as well.
- **20. BBQ Days** - During the summer months, a BBQ party can provide an inexpensive opportunity for employees to enjoy an afternoon outside and connect with each other outside of the office.
- **21. Wow 'Em** - An employer created a "Wall of Wow" that was intended to visually represent successes and accomplishments of the team. On the wall, they would place positive e-mails, symbolic graphics, charts, and completed sample project documents.
- **22. Attributes Picture:** Ask peers to share one word about co-workers assets/attributes at work, and type those words in a word cloud app/website to create a picture to frame for each employee reminding them of their strengths.

Berry Organizational & Leadership Development – Mini-Selection of Training Topics

- Effective Coaching Skills
- Motivating Others and Rewards
- Assertiveness
- Effective Delegation Skills
- Effective Communication Skills
- Focus on Customer Service
- Turn Conflict into Opportunity – Conflict Resolution
- The Right Questions: Effective Interviewing and Hiring Practices
- Understanding and Utilizing Generational Differences in the Workplace
- Job Analysis: How to Write a Job Description*
- Anti-Harassment and Discrimination*
- Workplace Violence
- Diversity
- Ethics in the Workplace
- How to have an Effective Meeting
- Understanding how Personality plays a role at Work (personality assessments to be included; separate fee if requested)



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