

Planning for Staff Cross-Training



Staff cross-training involves training employees to perform tasks and responsibilities outside their primary job functions. This job aid offers steps to plan for staff cross-training at your agency.

What are the benefits of cross-training staff?

Cross-training staff increases workforce flexibility, enabling staff to adapt more effectively to workload fluctuations, employee absences, or policy changes that require operational change. Done well, cross-training benefits both the organization and staff. These benefits include:

- Increased adaptability to changing work conditions
- Variety and the opportunity to learn new career-relevant skills
- Enhanced communication, collaboration, and team cohesion
- Staff retention
- Overall staff satisfaction

Which jobs are best-suited for cross-training?

Ideally, every job task should be able to be performed by at least one other employee besides the current job holder. This includes leadership!

In practice, cross-training helps ensure that time-sensitive operational activities—such as service delivery, data and grant submissions, and payroll—can proceed seamlessly regardless of absences or vacancies.

Note: Licensure requirements (e.g., nursing, physician, or clinical social worker), union agreements, and company policies may define which tasks can be performed by employees with different job titles and credentials.

What are pitfalls to avoid?

The success of a staff cross-training plan depends on three things: timing, training quality, and staff participation.

- **Timing:** If the cross-training plan is presented in conjunction with announcements about budget cuts, hiring freezes, or other cost-cutting measures, employees may perceive the cross-training as a ploy to eliminate jobs, or to avoid hiring needed staff.
- **Training quality:** Asking staff to do new tasks before they've received adequate training increases stress. Staff are likely to feel exploited and unsupported, rather than appreciative about being given an opportunity for professional development.
- **Staff participation:** Imposing cross-training without giving staff an opportunity to participate in the planning will likely increase resistance to the plan, and lower the quality of results.

Steps to Developing a Staff Cross-Training Plan

1. Partner with your human resources (HR) team

Before formally cross-training staff, you may need to consult with HR to determine any prohibitions or limits on cross-training, such as union agreements, employment laws, or job description language.

2. Identify appropriate positions for cross-training

Begin with positions where cross-training can yield the biggest benefit both for the organization and for staff, such as:

- Positions where an absence or departure bottlenecks daily operations
- Positions that experience high turnover
- Pairs of interdependent roles, where one role hands off to the other

3. Introduce the idea of cross-training to your team

Here's a sample script: *"I've been thinking about ways to make things easier for all of us when someone is out sick, or when we have to move quickly to respond to policy changes. Other agencies have benefited from cross-training. Cross-training involves learning how to do at least part of another person's job so there's backup anytime someone is out.*

We've already done a bit of filling in here and there out of necessity, but that can be stressful. Cross-training will let us be proactive about preparing for absences, vacancies, and workload changes. Have any of you participated in cross-training before? What was your experience? Any lessons learned you would like to share?"

4. Engage staff to test a cross-training change idea

- Start small. Pilot your training approach; notice what works and what doesn't before making broader changes across your agency.
- Offer two or three role pairs (see Step 2) and ask staff to choose the pair they think would be best for a cross-training pilot.
- Ask for volunteers from among current job holders to participate in the pilot to allow staff members most open to the idea to self-identify.

5. Work with the volunteers to design the training

- Deconstruct each position into its key tasks.
- Prioritize this list of tasks. Starting with easy, frequent tasks allows for quick wins, insights about the benefits and challenges of learning new roles, and practice working as a team.
- Create a list of the knowledge, skills, and abilities (KSAs) needed to perform the priority task.
- Schedule time for training—and for practice after training.

6. Conduct the training

Document the training in writing or a video to make training the next person faster and easier.

7. Review, Reflect, Revise → Rinse, and Repeat

Learn from each experience. Apply those lessons to the next role. Keep going!