

NonProfit Financial Managers

Professional Development for Your Organization and Your Staff

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Health Resources in Action
Advancing Public Health and Medical Research

Organization-wide Professional Development



Baseline Questions

How many of you are responsible for overseeing professional development within your organization?

How many of you wish you could (feel you should) do more to support organization-wide professional development?

What are some of the challenges to developing and managing professional development within your organization?



Challenges?

- ?



What is Professional Development?

HRiA Definition (from PD plan)

- Learning to build upon or expand **professional skills** by participating in:
 - › **Experiential** learning opportunities situated in practice,
 - › **Formal activities** such as webinars, trainings, coursework, and conferences.



What for?

Benefits

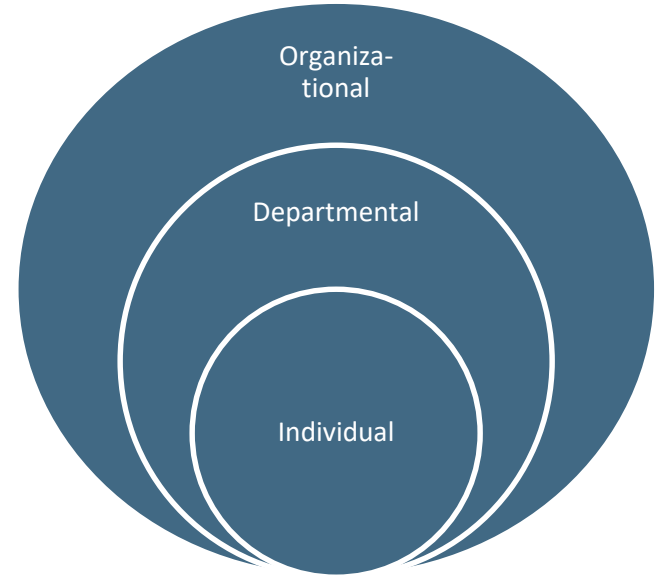
- Maximizes employees' professional potential (more effective/efficient);
- Leads to greater job satisfaction;
- Aids in recruitment and retention;
- Promotes the delivery of high quality services to clients;
- Promotes equity by creating a more level playing field;
- Standardizes and creates best practices for doing work;
- Adds organizational capacity to do new kinds of work;
- Creates a “culture of learning”;
- Other Benefits?



Where & How Professional Development Occurs

Levels

- Organizational (typically formal)
 - › Organization-wide trainings with internal or external facilitator/source (in-person or virtual);
 - › Shared reading.
- Departmental/Program (typically formal)
 - › Training specific to departmental/program needs;
 - › Organization-wide training content presented in smaller, “safer” environment.
- Individual
 - › Experiential
 - › Formal Training



Low/No Cost Training Options

What methods and sources have you used to provide training at low or no cost?

- ?



Consider Forming a Staff PD Committee

Tasked with planning and execution of PD activities

- Contribute broader knowledge of staff needs;
- Can organize specific activities (share the workload);
- May be able to provide some training themselves.



Develop a Formal Plan

Outline what to be done over the next year(s)

- Establish
 - › Goals,
 - › Objectives,
 - › Strategies,
 - › Metrics for success.
- Organize by priority areas
 - › Organization,
 - › Department,
 - › Individual.
- Make it doable



Example from HRiA PD Strategic Plan

Priority Area 1: PD at the Organizational Level

- Goal 1: Support a culture where PD is valued and promoted to all staff.
 - › Objective 1.2: By June 2018, HRiA will provide 8 internal PD opportunities for staff (e.g., half-day trainings, Lunch and Learns, (provided by all committees across HRiA) etc.), with at least one focused on equity and inclusion
 - › Strategies
 - 1.2.1 Synthesize information from individual PD goals and identify common themes from plans to inform development of trainings
 - 1.2.2 Administer all-staff survey on PD interests to collect data to guide the development of internal trainings and communicate findings back to staff and managers
 - 1.2.3 Develop and administer 8 internal PD opportunities and trainings within HRiA in FY18 that align with 4 quadrants of work (i.e, thought leadership, management, business development, project work) and organizational strategic plan. Ensure at least one opportunity is focused on equity and inclusion.
 - 1.2.4 Evaluate feedback of each PD opportunity to inform continuous planning (develop evaluation survey and standardize for all sessions) and to inform FY19 PD planning
 - › Metrics: Number of internal PD opportunities held by committees or overall organization (tracked by PD committee)



Provide Guidelines for Staff

Introduction to professional development at the organization

- Why (values statement)

Operational details

- Who (All, departmental, individual);
- What (types of training/learning forums, experiential vs. formal);
- Where (internal and external opportunities);
- When (frequency expectations) and;
- How (process for accessing, approvals, budget allowance)



Data Gathering/Reporting

Collect data on organization-wide needs to inform offerings

- Surveys
- Basic skills inventory
- Common needs identified in individual professional development plans

Collect attendance and evaluation data

Gather individual participation data

- Report out during annual performance review
- Aggregate (if there is capacity)

Analyze and report out annually

- Against plan if one exists



Organization-wide PD Cycle



Additional Considerations for Individual PD

Be clear about career pathways

- Consider providing written guidelines explaining position levels and how to grow within role or be promoted

Ensure supervisors know how to support their staff's PD

- Provide training
- Include as part of supervisor's evaluation

Include PD section in performance reviews

- Retrospective
 - › What learning and job growth took place
 - › Goals and plans for the coming year



Individual Planning Cycle



Professional Development for Administration & Finance Staff



Challenges

Some issues unique to A&F staff

- A&F staff often perform routine, repetitive tasks;
- Department may be quite small without next level position to step into;
- CFO/supervisor may not be expert in supporting PD;
- Staff may already be highly competent in current role;
- Staff may not have the bandwidth to take on additional or higher level tasks;
- Budget restrictions
- Others?



Opportunities

Create room to grow

- Look for systems improvement/create efficiencies to increase capacity to take on new work, such as:
 - › Electronic processes
 - › Elimination of duplication and manual entry

Consider opportunities to learn about other areas of the organization to inform work/give context

- Assist with program delivery
- Shadow program staff
- Attend conferences related to mission (vs. A&F function)



Opportunities (continued)

Provide higher level finance training to give more understanding of how their work fits into system, such as

- Accounting basics or advanced;
- Rules and regulations.

Assess need for soft skills training, such as

- Communication/presentation skills;
- Project management.
- Supervision training

Other Ideas?



PD for Finance Staff at EDC

System/approach

EDC is striving to create a foundation and a culture where professional development is an explicit and ongoing initiative that is encouraged, valued, rewarded, and meaningfully embedded in the work life of all staff. To this end, EDC requires that performance reviews of all staff include a discussion of the professional development goals of the employee and the progress that the employee makes on these goals.

- Performance Evaluation
 - › Setting goals
 - Work goals vs. professional development goals
- Conferences
 - › Process for attending conferences



PD for Finance Staff at EDC

- Tuition Reimbursement
- Project Based Trainings- Understanding the work
- Using vacation days for Trainings
- Internal and External Trainings
 - › Project Management Training
 - › Supervisor's training
 - › Excel/ Advanced Excel Training
 - › Power BI



PD for Finance Staff at EDC

- Pathways to Leadership/Mentoring
- EDC Virtual University
- Brown Bag Lunches
 - › Systems Training
 - Accounting software
 - Timesheets Trainings
 - Other recorded Trainings



Questions/Comments?



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