



CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

# Workshop Sample - Return to Instructor



# CalHR Cross-Training

*Guide to cross training*

# Table of Contents

## **Introduction**

<i>Short Term Benefits</i> .....	2
<i>Long Term Benefits</i> .....	2
<i>Cross-Training</i> .....	2
<i>Goals</i> .....	3

## **Implementation**

<i>Eligibility</i> .....	4
<i>Where to submit documents</i> .....	5
<i>How long will cross-training last</i> .....	5
<i>Does this affect pay</i> .....	5
<i>How is workload affected</i> .....	6
Sample Expectations for Participants .....	7
Sample Activities to Engage In.....	7
Expectations for Current Supervisor and Division .....	8
Expectations for Cross-Training Supervisor and Division .....	8

## **Supplemental Documents – Also available on SharePoint**

<i>SharePoint Links for Supplemental Documents</i> .....	9
<i>Division Chief Request for a Participant</i> .....	10
<i>Cross-Training Employee Application</i> .....	11
<i>Employee’s Request for Cross-Training</i> .....	12
<i>Cross-Training Plan</i> .....	13
<i>OPF Commendation Letter Template</i> .....	14
<i>Screening Criteria Template</i> .....	15

<b>References and Resources</b> .....	16
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# Introduction

The California Department of Human Resources (CalHR) is proud to implement cross-training to help ensure vital knowledge is not lost when separations occur, give employees the opportunity to work in another division, and to diversify their work experience. Cross-training is one of the initiatives outlined in CalHR's Workforce Plan under Knowledge Transfer Strategies. Cross-training benefits both the employee and the organization by:

## *Short-term Benefits*

- Provides employees with growth and development opportunities
- May provide managers with an opportunity to increase the diversity of their own work areas
- Improves overall morale department-wide
- Assists in the sharing of organizational goals and objectives
- Improves understanding of the different parts of the department and eventually of the organization as a whole

## *Long-term Benefits*

- Helps employees acquire and enhance skills, knowledge and abilities
- Trains staff across programs and platforms
- Offers professional development opportunities and exposure to different career paths
- Leads to better coordination and teamwork. This shapes us into a more flexible organization
- Improves overall motivation department-wide
- Provides a recruitment advantage for various positions

## **Cross-Training**

There are often unforeseen instances such as employee sickness, family emergencies, sudden departure, etc. that leave institutions vulnerable to decreased productivity. However, cross-training can avoid such downfalls.

Cross-training is when an employee learns the skills of, or trains to perform tasks of another position within their organization to increase effectiveness and ensure a smoother transition from one employee to another.

### **Two ways cross-training can be initiated**

- A division has a need for specific skillsets to assist with a project or assignment that will allow employees to develop new skills
- An employee has a desire to learn about work in a different division/unit

### **Goals**

- Provide a program employees will find useful to connect to the importance of institutional knowledge and experience with professional development
- Retain highly qualified and experienced employees
- Create a culture of learning, sharing, and networking within CalHR
- Assist CalHR employees in achieving their career goals

# Implementation

## Eligibility?

- Permanent Status – Passed probation in a previous civil service class
- Must be in good standing – No documented performance issues
- Must be dedicated to completing regularly assigned workload while participating in the cross-training program<sup>1</sup>
- Must have supervisor approval
- Management considerations:
  - Number of cross-training employees within the division
  - Employees serving on other committees
  - Employee Participation in ELPP or other programs

Division Chiefs will need to identify the skill sets they are looking for in a candidate in the *Division Chief Request for a Participant*. They may also ask candidates to answer some questions which **may** include:

- 1) From your own research of the duties of the position, what draws you to the \_\_\_\_\_ Division/Unit?
- 2) Rate your \_\_\_\_\_ skills from 1 to 10, one being no experience and ten being advanced skills. Please explain the basis of your rating.
- 3) What skill sets do you have that will help the \_\_\_\_\_ Division/Unit?
- 4) What draws you to this opportunity?
- 5) Rate your general technology skills (i.e., Excel, SharePoint, webinar technology, creating videos, etc.) from 1 to 10, one being no experience and ten being advanced skills. Please explain the basis of your rating.
- 6) What other knowledge, skills, and abilities do you have that will help you be successful with this opportunity?
- 7) What knowledge, skills, and abilities do you hope to develop or improve as a result of this opportunity?

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<sup>1</sup> Division Chief and current supervisor must come to an agreement on the time, workload commitments and duration required for cross-training

## **Where to submit documents?**

Employees requesting cross-training must submit the *Employee's Request for Cross-Training Form* to the Chief of Human Resources (HR) either through email or hardcopy. The Chief of HR will facilitate the discussion with the Division Chief to determine if there is bandwidth to take on a Participant or if specific concerns should arise about the cross-training request.

Division Chiefs requesting cross-training must submit their *Division Chief Request for a Participant* to the Chief of HR either through email or hardcopy.

The Chief of HR will send out an email to all employees announcing the cross-training opportunity and the process for applying.

Employees responding to a Division Chief's cross-training request must submit their application directly to the Division Chief. Divisions may choose to review and score the applications and/or meet with potential participants to determine who to select for the opportunity. Screening criteria will vary by division based on their need. However, experience may not be the only factor when evaluating the candidate. Divisions may choose candidates based on their potential to grow and gain the most from the experience.<sup>2</sup>

## **How long will cross-training last?**

Cross-training length varies depending on the workload and the length of the vacancy in the unit requesting cross-training. Again, each Division Chief will announce the tenure of the cross-training in the initial announcement. If employees are requesting the cross-training, they will have to discuss options for duration with their supervisor and the division they plan to cross-train with.

Depending on the length of the cross-training there will be a designated amount of scheduled check-ins. The participant, the Division Chief of the division the employee is cross-training in and the employee's supervisor must meet with the Chief of HR to discuss the progress of cross-training.

## **Does this affect pay?**

No, the employees selected to partake in cross-training will be assigned work commensurate with their current class or equivalent class. Cross-training will only be allowed for positions employees can transfer into unless they are performing the duties of a classification in their promotional path less than 50% of the time. There is no additional compensation for cross-training. However, after the completion of cross-

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<sup>2</sup> Divisions have discretion in selecting their candidates. However, they may confer with HR for additional guidance.

training, employees will receive a commendation letter and a copy for their Official Personnel File (OPF). Division Chiefs will draft the commendation letter and send it to the Chief of HR. The Chief of HR will then obtain the Director's signature and provide the letter to the participant as well as place a copy in the participant's OPF.

### **How is workload affected?**

Employees will only cross-train for a few hours (a day or a week depending on the need) and will then return to their regular position. This is an opportunity for them to broaden their experience and is completely voluntary. Employees acknowledge that they must complete their regularly assigned workload while participating in the cross-training program.

If employees are unable to manage their regular duties, they may terminate the cross-training. If current supervisors are experiencing workload challenges, they may also terminate the cross-training. If the division is experiencing issues with the participant, they may terminate the cross-training. Please consult with the Chief of HR if these issues should arise.

## Sample Expectations (For Participants)

Cross-training is a completely voluntary opportunity for employees to broaden their experience. However, it does have requirements and expectations.

- Strong Interpersonal Skills
- Technical Competency
- Confidence
- Resourcefulness
- Ability to maintain confidentiality
- Open to feedback and coaching
- Organized and honor time commitment
- Support program improvements

## Sample Activities to Engage In (For Trainer)

- Share career stories with the participant, in regards to issues within the unit/division
  - Discuss situations of conflict to inform the employee on the best method to address conflict situations within the division/unit
  - Discuss the unwritten rules of the division/unit as well
- Discuss the participant's strengths and growth areas to establish what aspects of the division/unit the participant actually needs training in and what aspects he/she already comprehends
- Discuss learning styles and preferences
- Identify three to five objectives that the participant will accomplish during the duration of the cross-training
- Establish a lesson plan and schedule that works for both participant and participant's supervisor



## Expectations for Participants' Current Supervisor and Division

- Supervisors must be equitable in determining whether to approve staff participation. They cannot reject their employee's request to cross-train based solely on workload because it is understood that the employee must be able to complete his/her regularly assigned work while participating in cross-training.
- Supervisors may consider adjusting workload to accommodate participant's time away from their normal duties
- Support program goals through encouraging employee participation
- Have regular check-ins with the participant
- Have check-ins with Chief of HR to discuss progress
- Be a positive role model
- Be engaged
- Be supportive

## Expectations for Participants' Cross-Training Supervisor and Division

- Support program goals by providing guidance and training to participant including ensuring a proper training plan is in place
- Have regular check-ins with participant
- Have check-ins with Chief of HR to discuss progress
- Be a positive role model
- Be engaged
- Be supportive
- Honor commitments
- Have regular check-ins with the participant

## SharePoint Links for Supplemental Documents

The following forms are available on SharePoint and are included here as links. Samples are in subsequent pages.

- Division Chief Request for a Participant
- Cross-training Employee Application
- Employee's Request for Cross-training
- Cross-Training Plan
- OPF Commendation Letter Template
- Screening Criteria Template

# Division Chief Request for a Participant

## Cross-Training Initiation

Division \_\_\_\_\_ Unit \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_

Time Commitment: \_\_\_\_\_ hours per week Duration: \_\_\_\_\_ months

Cross-training position \_\_\_\_\_ Unit Supervisor \_\_\_\_\_

### Target audience

- 
- 
- 
- 

### Desired skill sets

- 
- 
- 
- 
- 

### Responsibilities

a.

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b.

---

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c.

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# Cross-Training Employee Application

(Division Initiated)

Employee Name \_\_\_\_\_

Division \_\_\_\_\_ Unit \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_  
(to be cross-trained in) (to be cross-trained in)

Current position \_\_\_\_\_ Current Supervisor \_\_\_\_\_

How desired skill sets are met

- 
- 
- 

Experience that will be helpful to the Division/Unit providing cross-training

a.

---

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b.

---

---

c.

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\_\_\_\_\_  
Current Supervisor's Signature

\_\_\_\_\_  
Current Division Chief's Signature

I approve the application of my employee as a candidate for cross-training.

If you do not approve a candidate for cross-training please state why (see *Management considerations* on page 4). (For HR use only)

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Employee's Request for Cross-Training

Employee Name \_\_\_\_\_

Current Division \_\_\_\_\_ Current Unit \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_

Current Classification \_\_\_\_\_ Unit Supervisor \_\_\_\_\_

Please list the Division \_\_\_\_\_ and Unit \_\_\_\_\_ you would like to cross-train with.

Why would you like to cross-train in this division?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What skills can you bring that will be beneficial to the division?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Current Supervisor's Signature

\_\_\_\_\_  
Current Division Chief's Signature

I approve the application of my employee as a candidate for cross-training.

If you do not approve a candidate for cross-training please state why(see *Management considerations* on page 4). (For HR use only)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Cross-Training Plan

Classification/ Job Title \_\_\_\_\_

Division/Unit \_\_\_\_\_

Trainer \_\_\_\_\_

Date \_\_\_\_\_

Time Commitment: \_\_\_\_\_ hours per week Duration: \_\_\_\_\_ months

Topics to be covered

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Equipment needed (if applicable)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Recommended Training Classes (if applicable) \_\_\_\_\_

\_\_\_\_\_

## OPF Commendation Letter Template

Month XX, 20XX

Dear \_\_\_\_\_:

On behalf of the Department of Human Resources, I would like to thank you for your participation in cross-training with the \_\_\_\_\_ division. Your participation in cross-training provides for a workspace with diverse skillsets and experience.

\*This space has been intentionally left blank for Division Chiefs to include a narrative of what the candidate did while in cross-training program and their accomplishments.\*

Your efforts to grow and develop are valued by the management team. A copy of this letter of commendation will remain in your Official Personnel File to serve as evidence of your performance and contribution to the department.

Sincerely,

Director

cc: Employee's Official Personnel File

## Screening Criteria Template

Candidate's Name	Rater's Signature	Date
Applicable Experience or Knowledge Skills Abilities (KSA)	Score	
<p>I.e.: Has general technology skills (i.e., Excel, SharePoint, webinar technology, creating videos, etc.).</p> <p><b><u>Well Qualified (4-5 points)</u></b> Candidate provides <b>thorough</b> example(s) of his/her general technology skills.</p> <p><b><u>Qualified (2-3 points)</u></b> Candidate provides <b>reasonable</b> example(s) of his/her general technology skills.</p> <p><b><u>Not Qualified (0-1 point)</u></b> Candidate provides <b>marginal</b> example(s) of his/her general technology skills.</p>		
<p>I.e.: Has potential for growth and development</p> <p><b><u>Well Qualified (4-5 points)</u></b> Candidate provides a <b>thorough</b> narrative of why he/she is interested in this opportunity. (i.e. potential to gain the most from the experience).</p> <p><b><u>Qualified (2-3 points)</u></b> Candidate provides a <b>reasonable</b> narrative of why the he/she is interested in this opportunity. (i.e. potential to gain the most from the experience).</p> <p><b><u>Not Qualified (0-1 point)</u></b> Candidate provides a <b>marginal</b> narrative of why the he/she is interested in this opportunity. (i.e. potential to gain the most from the experience).</p>		
TOTAL POINTS		



## References and Resources

The following resources were used in the development of the CalHR Cross-Training.

California Department of Human Resources, 2016 Workforce Plan 2016-2021.

<http://calhr.ca.gov/Documents/calhr-workforce-plan-2016-to-2021.pdf>

Area Development, 2013 Cross-Training: Creating and Implementing a Successful Plan.

<http://www.areadevelopment.com/laborEducation/Q1-2013/implementing-cross-training-hot-back-ups-37372612.shtml>

The Balance, 2017 Learn About Cross-Training Employees. <https://www.thebalance.com/cross-training-employees-2275317>