Features, Published October 2008

Save the World, Make a Buck: Seven Ideas From the Nonprofit Sector

Marty Rosenheck, Ph.D., CPT, Kirsten D'Aurelio, Roy Strauss and John Rosenheim

Nonprofit organizations have been borrowing from corporate models for years. But when it comes to training and performance improvement, for-profit companies can learn a lot from nonprofits.

Part of Sarah Clark's role as managing director of outreach and training at Amnesty International USA (AIUSA) is to enable people to perform their jobs effectively in support of the organization's strategic goals. To accomplish this, she must take on seven daunting challenges:

1. Align learning with the organizational mission and goals.
2. Motivate people to learn and perform.
3. Develop effective leaders.
4. Provide measurable results.
5. Deploy the best mix of media and methods.
6. Focus on job role success.
7. Encourage diversity.

Even though AIUSA — known for defending human rights worldwide — is a nonprofit organization, its counterparts in the for-profit sector face the same challenges. We've observed that while nonprofit and for-profit organizations differ in many ways, learning leaders in both types of organizations have many training issues in common — and can share solutions.

Long-Term vs. Short-Term Training
One key difference between nonprofits and for-profits is the focus of training. While both sectors aim to maximize the training function to enable their people to achieve organizational goals, nonprofits tend to have a long-term focus since they are not judged on a short-term quarterly profit basis.

As a result, nonprofits are practiced at dealing with issues that span years or even decades, giving them an opportunity to incorporate capacity-building initiatives. On the other hand, private companies must maximize their profits in the near term, and this can lead to a myopic approach to training. Interestingly, though, this trend is starting to reverse, as nonprofits increasingly are being held accountable to funders for short-term results, and more successful companies are focusing on the long term. Consequently, the implication for training is that it must support both long-term capacity building and short-term results.

Staff
For-profit corporations generally train paid staff, whereas many nonprofits rely heavily on volunteers and must train them in addition to staff. While for-profits can mandate training, nonprofits can only encourage, not mandate, volunteers to participate in training. A key implication is that nonprofits have become very good at motivating people to learn by tying training to the interests, needs and passions of their volunteers.

Funding
In nonprofits, training often is seen as a critical means to serving the mission, whereas in for-profits, training often is seen as a line item that is expendable in tough economic times. Because of their devotion to the training function, many nonprofits have to figure out how to train on a shoestring — a skill that can be very useful to for-profits.

Nonprofit Training Study
While nonprofits and for-profit organizations differ in many ways, they also have to deal with many similar challenges. For example, AIUSA, like many for-profit organizations, has seven challenges to overcome in creating training that helps people effectively perform their jobs in support of the organization's mission and goals. To address these training issues and plot a strategic course for training initiatives, Clark commissioned Cedar Interactive to conduct a benchmarking study to learn how other top nonprofits address these challenges.

We interviewed leaders of the training function at eight major nonprofit organizations. Among the eight were large international organizations that focus on human and civil rights, public health and safety, environmental issues and workers' rights. Respondents were asked questions regarding the organization of the training function; how they develop, deliver and evaluate training; how they work with various audiences and encourage diversity; how training is funded; and how they budget their training resources.

Challenge 1: Aligning Learning With Organizational Mission and Goals
Many organizations — whether nonprofits or for-profits — find that training has taken on a life of its own, and a disconnect has emerged between the training offered and the goals of the organization. This can cause leaders to question the value of training because it is not perceived to be moving the organization toward its mission-critical goals.

All of the organizations in the nonprofit training study are working to align their training with their organizational mission and goals, and/or the competencies related to specific roles, so that training leads to specific results that can be tracked and assessed. Most study participants looked to their organizations' strategic plans to help keep training in line with organizational missions. As one respondent put it, "We're making our campaigns and campaign goals more clear, and we're trying to build leaders to achieve those goals."

Best Practice: Put a process in place that periodically prioritizes training efforts in relation to the mission and strategic plans of the organization.
- Gather input about the organization's current goals and priorities.
- Identify the current state of the organization.
- Form a small decision-making body that considers resources, determines priorities and creates a plan with accountability and budget allocations.

Challenge 2: Motivating People to Learn and Perform
Nonprofits need to develop volunteers who can choose whether or not to partake in a training offering. The challenge is to make training engaging, relevant and useful in enabling people to achieve their goals, so they want to attend.

Even though for-profits can require employees to take training, they would be well-served to design training as if it were for volunteers — so that employees are intrinsically motivated to engage in and apply the training offered. When skills are integrated with relevant job tasks, scenarios or cases, not only are people more motivated to learn the skills, but they are more likely to apply them on the job.

Best Practice: Teach skills within the context of the organizational mission and key job tasks.

Challenge 3: Developing Effective Leaders
Most of the organizations in the nonprofit training study see the development of effective leaders as a key challenge. Nonprofits depend on the personal leadership of a core group to motivate larger numbers of staff and volunteers. The issues they encounter are similar to those that for-profits deal with, including selecting those with leadership potential and developing key leadership and management skills targeted to roles and responsibilities.

The development of these leaders may involve new training methods and motivation such as intense group retreats, mentoring programs and personal development coaching, distance learning and social networking tools, as well as more traditional leadership training and organizational development methods.

Best Practice: Develop a comprehensive curriculum based on roles and competencies for key volunteer leadership positions. Use e-learning and other methods to cultivate skills for activists and leaders to do their jobs more effectively. Make sure the training offerings are clearly perceived to support them. One organization in the study develops leaders through a combination of intense retreats and up to two years of working with leaders in the field. In addition to leadership and organizing skills, they focus on personal development as a core aspect.

Challenge 4: Providing Measurable Results
As difficult as it is to measure return on investment (ROI) in for-profit organizations, it's even more difficult with nonprofits because they measure ROI in broad accomplishments such as increases in membership, legislative victories and raised public awareness.

In short, nonprofits must measure ROI by how well a program furthers the mission of the organization rather than simple monetary profit. Most organizations are struggling with ways to track volunteers in the field and to evaluate the results of their training. The difficulty in measuring results leads to a larger challenge: justifying the expenditure on training. As one nonprofit learning leader in the study said, "It has been a challenge to internally sell the training vision…and sell it to the Board."

With respect to Donald Kirkpatrick's well-known training evaluation model, all of the respondents employed Kirkpatrick's Level 1 evaluations to gauge participants' reactions to the training. Many also used Level 2 knowledge assessments. But most of the organizations struggled with how to evaluate application in the field (Level 3) and especially how to evaluate organizational results (Level 4).

Here are some of the ways nonprofit training study participants evaluated application in the field (Level 3):
• As program staff work with volunteer leaders, they assess whether integration is happening (and whether it's a training issue or something else).
• Tracking application in the field is done informally with volunteer leaders as they move through the year.

• Application is monitored through close e-mail contact between participants and instructors post-course.
• Direct supervisors write evaluations on each volunteer.
• A six-month survey is conducted that shows which skills from the workshops have been implemented.

In their own words, here are some of the ways that participants evaluated results (Level 4):

• "In terms of ROI, we're putting more attention now on the cost of events/cost per person."
• "We look at the amount of media coverage and feedback from local groups."
• "Chapter performance standards are in place, coupled with sanctions for reaching/not reaching those benchmarks."
• "There is a periodic revisiting of outcome agreements with the leadership team from each chapter."

Nonprofits are still struggling with how to meaningfully evaluate results, as are many for-profits. One learning leader summed it up: "You can do really well on these measures and still end up not changing anything. We have big concerns about developing the wrong measures that will steer us the wrong way organizationally. We called for proposals for evaluation tools, but they have all been rejected. We haven't nailed this yet."

Best Practice: At the end of instructor-led training, one organization has participants present action plans and then post them in their online communities. The community is self-monitoring and involves instant messaging and Facebook. Participants are able to act as coaches for each other. Then, one-on-one follow-up calls are done several times per year by the senior organizer and his team, including issue-oriented organizers. Online reports are due several times each year, and these reports are transparent online. Participants who stay on target with their action plans are rewarded with funding to go to the international conferences.

Challenge 5: Best Mix of Media and Methods
Nonprofits are using many learning methods and technologies, but by far the most commonly used method is instructor-led training. Following

that is on-the-job training involving mentoring or coaching, and then providing information resources and toolkits. Many organizations are moving toward e‑learning methodologies that include Web-based training, synchronous webinars and other online collaboration methods to expand their reach, reduce the cost per trainee and make training more widely accessible. Many respondents reported the use of a blended approach in which they use multiple media and methods to deliver highly effective training.

Nonprofits generally are slower to adopt technology-based initiatives because of the investment and the strong desire for face-to-face interaction. They are looking at how to integrate technology to get leverage, consistency and cost-savings in training many people over a wide geographical area.

Best Practice: Make training high tech and high touch by using a blended approach that utilizes face-to-face, asynchronous e-learning and synchronous Web meetings or conference calls. Build a blended curriculum in which each method is used for its strengths and each medium supports the others in an integrated way.

Challenge 6: Focusing on Job Role Success
The nonprofits in the study provided training for many audiences including leaders, members, the general public, internal staff and instructors. The challenge is to provide training that helps people perform their roles or jobs most effectively and to reduce the time it takes to develop competencies related to specific roles. Many study respondents have found that is not effective to teach skills in isolation. It is best to teach skills in relation to important job roles to motivate volunteers and give a context for learning the skills.

Best Practice: Examine the roles and competencies needed in each position and develop a coherent blended curriculum that develops excellence in those roles. One organization in the study is beginning to develop a comprehensive curriculum based on roles and competencies for key positions. The training uses e-learning and other methods to focus on what is needed for volunteers to do their jobs most effectively.

Challenge 7: Encouraging Diversity
Many respondents are trying to increase the level of multicultural awareness and diversity in their organizations. Through analysis of the study data, a multipronged approach to multicultural diversity emerged. This approach involves integrating:

- **Leadership:** Diverse leaders who are sensitive to multicultural issues.
- **Programming strategies:** Including training with cultural sensitivity.
- **Recruitment:** Including setting priorities to recruit diverse trainers and leaders.

Many of the nonprofit organizations we worked with have had tremendous successes with limited resources. They are continuing to move toward integrating e-learning and collaboration technology to increase their reach, reduce costs and relate to a younger audience that is more technology-savvy.

If you are a for-profit learning leader, these tips from organizations whose mission is to "save the world" can help your organization "make a buck." Of course, you may want to consider donating some of those extra profits to your favorite nonprofit.

Dr. Marty Rosenheck is Chief Learning Strategist for Cognitive Advisors. He can be reached at mrosenheck@CognitiveAdvisors.com

Roy Strauss is the president and founder of Cedar Interactive.

Kirsten D'Aurelio is head of Voicescape.

John Rosenheim is chairman of Universal Training. They can be reached at editor@clomedia.com.