Developing CAA Leaders Through an Effective Statewide Training Strategy

Presenters: Joseph Diamond, Executive Director, MASSCAP
Jessica Benedetto, Training and Resource Manager • Katherine McDermott, Consultant

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MTC Team

- **Joe Diamond**, Executive Director
- **Jessica Benedetto**, Training and Resource Manager
- **Lisa Clay**, Communications and Member Services Manager
- **Kathleen McDermott**, Training and Management Consultant
- **Patricia Pelletier**, Planning, Workforce Development, and Training Consultant
- **Martha Rogers**, Grants Manager
Learning Objectives

• Learn how MA’s CAA network, State Association, and State CSBG Office joined forces to develop an effective, comprehensive, and collaborative statewide training and professional development strategy

• Understand the mission, approach, and activities of the MASSCAP Training Center

• Understand how the MASSCAP Training Center is aiding network-wide and individual agency succession planning, and developing the CAA leaders of the future
ACTIVITY

1. What do you perceive as your top 3 to 5 training needs in your state?
2. How is your CAA network currently being trained? By whom?
3. What do you see as the roles of the State Association, the State CSBG Office, and the individual CAAs in addressing the top T/TA needs in your network?
Our Mission:

To enhance organizational performance of Community Action Agencies and other community-based organizations through a system of training and professional development.

Our Values:

The MTC supports both management and program excellence, is relevant in content and methodology, strives for innovation, and utilizes quality experts.


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MTC Background and Timeline

♦ **Since 1995:** Communities of Practice
♦ **Since 1998:** Developed/facilitated many sessions at conferences
♦ **Since 2000:** VITA Training w/IRS
♦ **2002:** Peer to Peer Assessment (NIQCA)
♦ **2009:** Financial Education Train-the-Trainer
♦ **2009:** Job Readiness Train-the-Trainer
♦ **2014:** Hosted National ROMA Trainer (NCRT) Part 2 for New England CAAs
MTC Background and Timeline

♦ 2014: MTC becomes strategic priority of MASSCAP Board of Directors

  MASSCAP will develop “robust on-the-mark training and technical assistance”

♦ 2014: MTC begins without state funding, mostly doing needs assessments and planning in year 1

♦ 2015: MTC receives state funding through State CSBG Office

♦ 2016: Receive full grant from state

♦ 2017: Workforce Training Grant; first Leadership Development Institute

♦ 2018: Pilot Direct Services Training Track
Developing a Training Strategy
Communities of Practice

Definition of Communities of Practice (CoP)

- Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly. (Lane & Wegner, 1994).

Components of a CoP

- Domain
- Community
- Practice

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Developing a Training Strategy
MASSCAP Communities of Practice

♦ Planners and ROMA Implementers/Trainers CoP
♦ CFO/Fiscal CoP
♦ Human Resources CoP
♦ Communications CoP
♦ Asset Development CoP
♦ Service Integration CoP
Developing a Training Strategy
Six Steps

1. Identify Need
2. Develop Tools and Processes
3. Develop Training and Trainers
4. Develop Resources
5. Implement
6. Evaluate and Report
STEP 1: Identify Need

- Network surveys
- Focus groups
- State CSBG Office collaboration
- Organizational Standards review and performance
- External environmental scan
- Continuous evaluation and adjustment

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FY18 Training Priorities

1. Best practices in policies and procedures, especially fiscal and HR policies
2. ROMA and ROMA Next Generation
3. Collective impact and community level strategies
4. Conflict resolution/Working with difficult people/Violence in the workplace
5. Succession planning/Building CAA bench strength and career pathways
6. Roles, expectations, and responsibilities of board members
7. Employability skills in the workplace
8. Teaching staff and clients to advocate for low-income programs/policies
9. Assessing, managing, and monitoring organizational risks
10. CAAs and the opioid crisis

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STEP 2: Tools and Processes

Management Components:

- Planning
- Coordination
- Funding
- Marketing
- Registration and tracking
- Evaluation and reporting
Ongoing Planning Activities:

- Training evaluations
- Biweekly team meetings
- Feedback from COPs and EDs
- Feedback from state CSBG office
- Organizational Standards review
- Specific T/TA requests
Training Strategies/Delivery Methods:

- Onsite trainings throughout state
- Communities of Practice
- Live webinars
- Recorded presentations
- Conference workshops
- Guidance on State and Federal funding and requirements
- Organizational Standards support
- ROMA technical assistance and support
- Resources/Info via MTC Newsletter

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Tools and Processes
Coordination

- Identify trainer(s)/presenter(s)
- Identify target audience
- Delivery method: onsite vs. online
- Schedule date/time
- Projected expenses and funding strategy
- Marketing strategy
- Participant registration and tracking
- Logistics: venue, cost, parking, food, IT needs, etc.
- Attendance and evaluations

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Tools and Processes
Funding

♦ DHCD grant
♦ Private grants
♦ Basic fee structure:
  • 1-2 hours onsite: $50
  • Half-day onsite: $75
  • Full-day onsite: $150
  • Live webinar: $15
  • Pre-recorded PowerPoint: $100
Tools and Processes
Marketing

♦ MTC Newsletter
♦ Communities of practice
♦ Monthly ED meetings
♦ Targeted emails/phone calls
♦ Personal networks
♦ MASSCAP website

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Tools and Processes
Registration
## Tools and Processes Evaluation

### 1. What is your overall level of satisfaction with the event?
- [ ] Very satisfied
- [ ] Satisfied
- [ ] Somewhat dissatisfied
- [ ] Dissatisfied

### 2. Please indicate how much you agree with the following statements:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The training was well organized</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The facilitator(s) was well prepared</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The content of the training was relevant to my work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I acquired new skills as a result of the training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I will be able to apply what I learned in my work</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The venue was suitable for the training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would recommend this training to others</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*This training enabled me to meet the following learning objectives:*

<table>
<thead>
<tr>
<th>Learning objective 1:</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning objective 2:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning objective 3:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 3. How would you improve this training (select all that apply)?
- [ ] Reduce the content covered in the training
- [ ] Increase the content covered in the training
- [ ] Slow down the pace of the training
- [ ] Speed up the pace of the training
- [ ] Allot more time for the training
- [ ] Shorten the time of the training
- [ ] No improvements needed
- [ ] Other: ___________

### 4. Please provide any additional feedback about this training.

______________________________

### 5. What are your recommendations for future MTC trainings?

______________________________
STEP 3: Develop Training and Trainers
Content Development

♦ Develop learning objectives:
  ➢ As a result of this training, participants will be able to:
    * Identify, Learn, Apply, Determine, Understand
  ➢ Overall objective and more specific

♦ Develop outline
STEP 3: Develop Training and Trainers
Identify Trainers

- Known and recommended by someone in the network
- Internet search
- Referred by an allied organization
- Suggested or approved by a state entity
- Other organizations as training resources
STEP 4: Develop Resources

- Core grant and relationship with state office
- Other capacity grants
- Focused grants from other entities
- Utilize expertise in the network
- Donated trainer time
- Donated space
- Fee structure

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Career Pathways Project

♦ Identify/Document career pathways in common CAA occupational areas

♦ Identify skills/training needs of CAA entry level, semi-skilled and mid-skill employees to enable position retention and upward mobility along pathway

♦ Develop consortium-wide skills-based training plan based on identified priority areas and skills deficiencies
The Question:
If the CAA network in MA has low-wage workers (which we know they do) and they also have jobs at high levels that they have to go outside of the network to hire into (which we know they do), how do we connect those pieces of the pipeline?
# Career Pathways Project

## Sample Career Pathway: Energy/LIHEAP

<table>
<thead>
<tr>
<th>Role</th>
<th>Education</th>
<th>Experience</th>
<th>Technical Skills</th>
<th>Soft Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receptionist 2</td>
<td>HSD or HiSet</td>
<td>1 year data entry setting</td>
<td>Basic computer, basic data entry, Spanish (bilingual job)</td>
<td>Good communication, Well organized, Work independently, Work as team member</td>
</tr>
<tr>
<td>Data Entry 2</td>
<td>HSD or HiSet</td>
<td>One year experience or equivalent (certifier)</td>
<td>Use standard office equipment, Use data capture and tracking methods, ability to make phone calls to verify information.</td>
<td>Ability to communicate effectively, Attention to detail, Work well with others, Sensitivity to cultural and economic diversity</td>
</tr>
<tr>
<td>Intake 5</td>
<td>HSD or HiSet</td>
<td>One year experience or equivalent (certifier)</td>
<td>Knowledge of data systems, spreadsheets, Compu. skills, Data capture and tracking methods</td>
<td>Ability to work independently, Ability to work on a team, Excellent verbal skills, Excellent organizing skills and attention to detail</td>
</tr>
<tr>
<td>Certifier 1 LIHEAP</td>
<td>HSD or HiSet</td>
<td>As an intake Associate, strong communication, experience, working with public</td>
<td>Strong working knowledge of LIHEAP regulations, Ability to use office equipment, Excellent computer skills</td>
<td>Excellent organizational skills, Most have reliable transportation, Must be able to work extended hours during peak season, Work evenings during high season</td>
</tr>
<tr>
<td>Coordinator 2 LIHEAP</td>
<td>HSD or HiSet</td>
<td>4-6 years working knowledge of LIHEAP programs/5 years staff supervision (Prog. Coordinator)</td>
<td>Good computer skills, working knowledge of Microsoft office</td>
<td>Excellent communication skills, Work independently in a stressful and fast-paced environment, Excellent organizational skills and attention to detail</td>
</tr>
<tr>
<td>Assistant Manager 1</td>
<td>BA</td>
<td>3 years experience in administration and supervision</td>
<td>Basic computer skills, Use data capture and tracking methods</td>
<td>Work effectively with people and work independently, Excellent verbal and written skills</td>
</tr>
<tr>
<td>Manager 1</td>
<td></td>
<td></td>
<td>Basic computer skills, Data capture and tracking methods</td>
<td></td>
</tr>
</tbody>
</table>
1. Low-wage staff want to advance in their careers.
2. Staff and supervisors see the need for and value of training.
3. Supervisors play a critical role in advancement of low-wage staff.
4. Education and experience are valued.
5. Job readiness skills can be developed and are essential for advancement of low-wage staff.
6. Leadership skills can be developed and are essential for advancement of low-wage staff.
7. Organizational supports are needed for the career advancement of low-wage staff.
8. A staff person’s demonstrated commitment and passion to the work of community action is a key characteristic sought by supervisors when considering advancement.
9. Challenges to advancement of low-wage staff include: cost of education; high turnover of low-wage staff; knowledge of career pathways, job openings, etc.
Utilize HR Group to help address recommendations from study

Heightened MTC focus on providing training to CAA low-wage staff through development of Direct Service Training Track

Leadership Development Institute for mid- to senior level managers
What opportunities does your agency, region, or state provide for staff to develop and practice their leadership abilities and help to develop your bench?
Leadership Development Institute

♦ Mid to senior level managers
♦ Interested in identifying, developing, refining, and practicing their leadership and management abilities
♦ Six full-day sessions
Leadership Development Institute

Session 1:

- History of Community Action
- Leadership in this Critical Time
- Self Awareness Using Everything DiSC Tool

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Leadership Development Institute

Sessions 2 and 3: You as a Leader in Your Agency

- MIT Four Leadership Capabilities
- Positive Leadership and Management Models
- Determine CAPstone Projects

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Leadership Development Institute

CAPstone Projects

♦ Team project
♦ Value to organization, the CAA network, or the community
♦ Team presents at last session

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Session 4: You as a Leader in Your Agency

- Every Leader/Manager’s Role in Building Strong Agencies through Financial Management
- Data Driven Decision Making
- Effective Presentation Techniques
Leadership Development Institute

Session 5: Leading Beyond Your Agency

♦ Building Relationships and Trust
♦ Coalitions, Collaborations and Collective Impact
♦ Understanding the Political Process on the Local, State, and National Levels

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Leadership Development Institute

Session 6: Graduation Ceremony

- Presentation of CAPstone Projects
- Celebration of Community Leaders
- Awarding of Certificates

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Leadership Development Institute

Results

♦ Evaluations

♦ Leadership Development Institute 2?
Think About:

♦ **WHAT** tools and resources would be necessary to create a culture of professional development in your network and/or develop a statewide training center?

♦ **WHO** might be responsible for each step?

♦ **HOW** would training be delivered (methods) and managed/coordinated?

♦ **WHEN** should each step occur?
Final Thoughts or Questions?

To learn more about MASSCAP and the MASSCAP Training Center, visit:
www.masscap.org
or contact Jess Benedetto, MASSCAP Training and Resource Manager, at:
jessbenedetto@masscap.org
EVALUATIONS

The Partnership Wants Your Feedback!

Please be sure to complete the evaluation for this session online,
via the CAPCON18 Event App.

Thanks in Advance for your Cooperation!