

Project Plan for: Enhancing staff skills through training

Project description

This project will help you provide staff members with the digital skills they need to succeed in your organization. You'll identify their training needs and connect them to training on the software tools they use most frequently.

Why take this on / what impact to expect:

If you complete this project, you can expect some or all of the following benefits to your staff and organization:

- More productive staff
- Staff members with improved job satisfaction
- A more secure organization because staff are better trained in security best practices
- Improved ability to deliver key organizational services efficiently and accurately

Estimated project timeframe: 2 - 6 weeks

Project deliverables

At the end of this project, your organization will have:

- An assessment of your staff's digital training needs and interests
- A training plan to help staff gain the digital skills identified
- A set of training resources/providers that can be used to fulfill the training plan

Project milestones & who leads:

The major steps involved in executing this project and who leads them are below. Keep in mind there may be more sub-tasks than what's noted here, but these are the major steps:

Milestone	Who leads?
1. Assess current state <ol style="list-style-type: none"> Conduct a survey of all staff to determine which software at your organization they most need and/or want additional training in. Ask questions such as: <ol style="list-style-type: none"> What is your preferred method of learning new software/digital skills? The last time you successfully learned a new digital skill, how did you acquire/learn the skill? What software/applications do you use most in your work? What training do you most need or want to help you succeed in using those software/ applications? Are there any major pain points you experience when you use the software/applications? What are they? Are there other digital skills that would help you succeed in your role? 	Your org
2. Create requirements/define your needs <ol style="list-style-type: none"> Based on the results of your assessment, who would benefit from training? What software/applications do they need to be trained on? 	Your org

<ul style="list-style-type: none"> b. What’s their preferred method of learning? (e.g., self-paced online tutorials, webinars, book, peer-to-peer coaching/learning sessions, other?) c. Understand your budget and resources available to help staff learn new skills 	
<ul style="list-style-type: none"> 3. Explore options <ul style="list-style-type: none"> a. Using the requirements above, evaluate potential solutions and vendors that offer the training or learning resources you need; see partial list of options below b. Conduct research to verify the quality of previous participants’ experience with each training resource c. Compare pricing for options 	Your org
<ul style="list-style-type: none"> 4. Establish a learning plan for each employee and select vendors/solutions for training 	Your org and/or solution vendor

Estimated project budget:

If you follow the approach outlined in this project plan template, we estimate the project budget to be as shown below. Please keep in mind this is only an estimate and final cost will vary based on your choice of solutions/vendors, hardware, etc.

Description	Cost per unit	# of units	Est. budget
Training on QuickBooks (various levels)	\$200-\$1,000		
Training on Microsoft Office, including Word, Excel, PowerPoint and more	\$0-\$800		
Cybersecurity Awareness Training	\$250		
Staff training on a specific mission-critical application in use at your organization. Examples include tools like Bloomerang, Classy, Salsa, ETO, Neon, and Abila.	\$0-\$2,000		
TOTAL			

Potential solution providers/vendors for this project:

While the Nonprofit Support Program does not endorse the vendors/providers below, our work in the community indicates that many of your peers have used the vendors below for similar projects. It’s essential that you research and fully evaluate solutions and vendors against your specific project requirements to ensure a good fit. We’ve recommended additional resources to help with that under “Learn more before you decide.”

QuickBooks training:

- Several [options available directly](#) from Intuit
- Online and in-person classes from a provider in [Shelton, CT](#)
- Online and in-person classes in [Hartford and Cheshire, CT](#)
- Highly rated, affordable, self-guided learning from [Udemy](#)

Microsoft Office:

- [Free online education from Microsoft](#)
- [TechSoup discounted Excel training for nonprofits](#)
- [Office “Boot Camp” essentials training, via TechSoup](#)

Cybersecurity awareness training:

NOTE: This training appears in two project plans – this one and the Cybersecurity Project plan. Please ensure that you only budget for this training once if you choose to pursue both projects)

- [Discounted KnowBe4 cybersecurity training on TechSoup](#)

- [Proofpoint SAT](#)
- [Sophos Phish Threat](#)

For other software:

- Most software/solution providers offer training resources for their products, including webinars, videos, articles and how-to's, chat, FAQs, and even consulting.
- If you need training in a product not listed above, check the solution web site to see what learning and training resources they make available.

Consider utilizing a Catchfire volunteer to help with select elements of your project implementation. More information about available Catchfire technology projects can be found [here](#).

Learn more before you decide:

To learn more about how to evaluate these solutions/vendors before you proceed, consider the following resources:

- Articles on QuickBooks training resources:
 - www.thebalance.com/best-quickbooks-classes-5070559
 - www.indeed.com/career-advice/career-development/learn-quickbooks
- [Why you need cybersecurity training for your staff](#)
- [Why phishing awareness is a worthwhile investment](#)

Related considerations:

While you're working on this project, it is a good time to also consider the following:

- Would your organization benefit from including annual training costs in its operating budget?
- How can you capture some of the training in writing so that future employees might have an easier time? Can some training be included in staff orientation/onboarding and in annual training requirements?
- If you have only one person trained in any specific application or program, would this be a good time to consider cross training a backup person, in case of emergency?