



The Case for Learning is a Case for Training

Capacity building for the individuals who comprise organizations

by Jan Masaoka and Ken Goldstein

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Two lines of thinking have recently gained ground in the nonprofit sector which unintentionally contradict each other. The first is a new appreciation for learning organizations and learning communities as essential to high performance organizations. The second is a disparaging attitude towards training: "Training doesn't do anything." One reason for this contradiction may be that the evaluation of training has used the wrong tools. This article addresses the question of supporting learning individuals just as we support learning communities, and suggests a more complex role for training than is conventionally considered.

We know an Army lieutenant colonel who retired to work for a nonprofit disability rights organization, and who placed tremendous importance on staff training. "In the Army we do two things," he said. "We fight, and we train."

Yet despite the new emphasis on capacity building for *organizations*, why are some technical assistance providers reluctant to see the value in capacity building for *individuals*—endowing staff and volunteers with the knowledge, skills, and perspectives for them to manage their organizations? How can training and support for nonprofit executives be recognized as critical, but not for people at the bottom and in the middle of organizations? The question we *should* be asking is: How can we help organizations invest in their most valuable asset: their paid and volunteer staff?

In this article we'll look first at what training can—and can't—accomplish, then at organizational objectives in training, evaluation of training, and finally, the future of nonprofit training. The principles in this article have emerged from CompassPoint's 28 years of nonprofit training, a laboratory that now encompasses 700 workshops and 6 conferences each year enrolling 11,400 individuals, on-line courses, and extensive internal and external evaluations of our training programs.

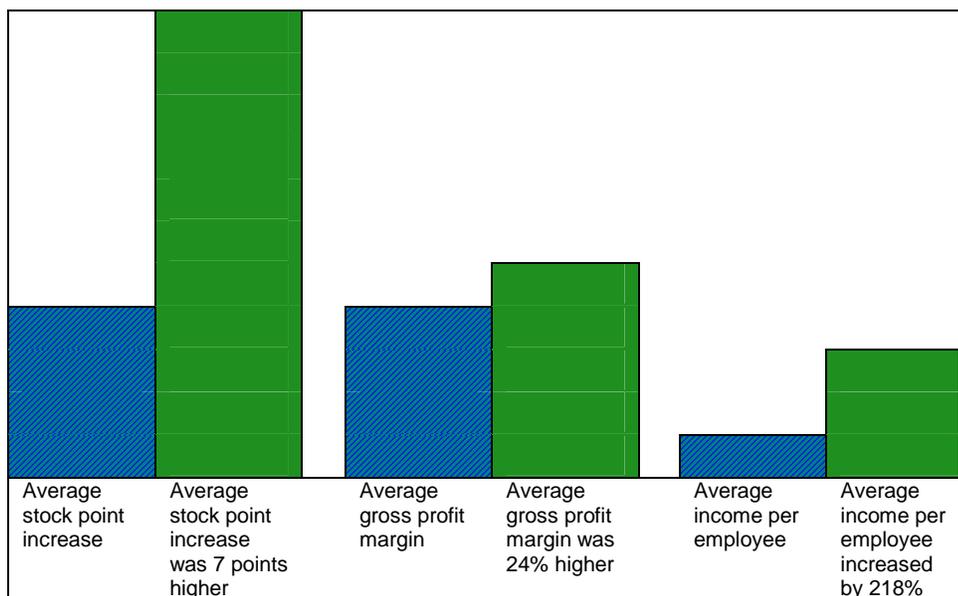
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Does training result in better overall performance?

Every year, America's for-profit corporations spend an average of \$1,300 per employee on training, and send 74% of their staff to training each year. If we look, however, at just the highest performing 5% of companies, we find they spend \$1,900 per employee, and send 86% of their employees to training each year.¹

What do these companies hope to accomplish with these large expenditures? It's clear: they know that company performance depends on individual performance, and individual performance relies on adequate training. Nonprofits know this lesson equally well: a case manager must have professional training as well as a commitment to clients; a bookkeeper must know bookkeeping as well as know how accounting supports the strategic plan.

Comparing the Performance of Publicly Held Companies by Amount of Training Expenditure Per Employee Per Year²



n = 575 publicly held US companies



Companies averaging \$915/employee/year in training



Companies averaging \$1,595/employee/year in training

¹ Laurie Bassi and Mark Van Buren, "Sharpening the Leading Edge," ASTD, 2001.

² Laurie Bassi, Jens Ludwig, Daniel McMurrer, and Mark Van Buren, "Profiting from Learning," SABA, 2000.

For for-profit companies, the measure of overall profitability encompasses a large number of inputs and external environmental changes. As illustrated above, for-profit companies invest in staff training for a simple reason: it pays off on the bottom line. For nonprofits, we might also look at the highest performing nonprofits, and compare their investments in their staff and volunteers to the investments of other organizations.

What can training accomplish for individuals?

Training is intended to change people in four areas: Knowledge, Attitude/Opinion, Skills, and Aspirations (KASA).

For example, a college course on the American Civil War may focus explicitly on knowledge transfer (facts), but is also likely to change a student’s attitude (about war, or about states’ rights), and increase skills (such as critical thinking skills). A high school course on basic car maintenance may transfer knowledge (about tires), change attitude (“Changing a tire isn’t so hard!”), increase skills (learn how to change a tire), and change aspirations (“I can change a tire . . . maybe I can learn to change the oil . . . I can take care of my own car!”).

In the chart below, boldfaced type indicates primary objectives:

	Changed Knowledge K	Changed Attitude A	Changed Skills S	Changed Aspirations A
College course on the American Civil War	Gain knowledge of facts	Evolve attitude towards wars and civil wars	Increase critical thinking skills	Aspire to learn more about history
High school class for girls on basic car maintenance	Knowledge of tires	More confident about situation requiring a tire change	Learn how to change a tire	Aspire to better car maintenance and self-reliance
Training in car sales	Gain knowledge of financing options	“I’m going to go out there and sell cars!”	Practice responding to questions	“I’m going to be salesman of the month!”
On-line course on sexual harassment prevention	Gain knowledge on what is sexual harassment and penalties	More determined attitude to prevent sexual harassment	Increased ability to recognize harassment behaviors	Enthusiasm for a harassment-free workplace

In a nonprofit setting, with the right training design, a single workshop can combine elements to produce satisfying outcomes for different participants:

	Changed Knowledge K	Changed Attitude A	Changed Skills S	Changed Aspirations A
Workshop on grant proposal writing— <i>taken by fundraising staff</i>	Gain knowledge of proposal process, components	More confidence about fundraising	Increased skill in writing a compelling case statement for own organization	Aspire to being an excellent grantwriter
Workshop on proposal writing— <i>taken by a program manager</i>	Gain knowledge of proposal process, components	Increased appreciation for development department	Practice turning own work into a case statement	Aspire to better understanding of fundraising and perhaps becoming executive director someday

A survey of CompassPoint workshop attendees found that in addition to new knowledge and skills, individuals readily identify five additional impacts:

- The opportunity to reflect on, rather than react to, critical issues. Giving employees the space to be reflective allows them to return to their tasks with greater motivation and understanding.
- A chance to put problems into perspective by hearing from others with similar concerns but in different settings.
- A forum for gathering ideas to share with co-workers and clients.
- The opportunity to meet and connect with others for future joint or coordinated action.
- Increased confidence and enthusiasm about the topic area. Related to changes in attitude and aspirations, the attitudinal change about a topic was one of the most commonly mentioned benefits of training.

Along these same lines, when the researcher Russy Sumariwalla did an in-depth, grounded evaluation study for CompassPoint on the impact of

This fantastic workshop gave me the nuts & bolts of budgeting as well as conceptual information on the value of budgeting and how it fits into my organization’s mission, planning and programs. This conceptual info has inspired and empowered me to take action!
--Workshop participant

training a few years ago, he unexpectedly found that the most important changes they reported were changes in *attitude*. They had broader appreciation for the field, they were more confident about their jobs, they felt better about what others in their organizations were doing. In short, they learned more about the organization and the sector in which they work and their own roles, and they gained a new, better rounded, more positive outlook.

What can training accomplish for organizations?

In addition to knowledge, attitude, skills and aspirations, training can affect organizational performance on a larger scale:

- Training is an important staff recruitment tool—in particular, young people consistently choose jobs that will provide professional development over ones that do not.
- Training is also an important *retention* tool—employees who are learning to be ever more employable are employees who are more likely to stay. Training opportunities—even when not utilized—are often seen by employees as perks or benefits. “I would never get to go to things like this if I didn’t work where I do,” wrote one workshop attendee.
- Training is also a powerful team building tool—especially diagonally across departments and from the bottom to the top of the organization. A time management class recently given to employees from an AIDS clinic gave top managers, social workers, accounting staff and clerical staff the chance both to learn new skills and to build personal relationships across the organization. In fact, training is such a powerful teambuilding tool that corporations often hold training sessions in areas completely irrelevant to work—such as river rafting or gourmet cooking—just to create cross-department and cross-hierarchy teambuilding.

Nonprofit staff evidence tremendous commitment and perform miracles, but there’s a terrible under-investment in these extraordinary people. Nonprofits must have a wide range of quality opportunities, from short bursts of training to long-term certificate programs. Given the stresses on the sector, the pressures on the job, the need for all of us to be constantly learning, staff development *must* be seen as one of the most important investments that a nonprofit or a funder can make.

-MaryAnn Holohean, Co-Chair,
Grantmakers for Effective Organizations

There is also obviously good training and bad training, and training that is appropriate or inappropriate to the audience or the situation. Put another way, an Excel class is not an Excel class. For example, commercial computer training firms often rely on a “command and drill” method where students are walked through computer commands and leave with fleeting “Ctrl Alt T” memories but no understanding of how Excel works or how to use it at work *tomorrow*. In contrast, the best nonprofit Excel classes combine budgeting principles with Excel practice, where students build budgets in Excel and need to decide *what to create* and the commands to do so. Such students leave with a conceptual framework of how Excel supports budgeting and planning, as well as templates they have built themselves, that they can work from the very next day.

Evaluating nonprofit training

Training programs have also suffered from being assessed against inappropriate objectives and by inappropriate means.

Imagine a scientist serving people carrots, and then asking them two questions: were the carrots delicious? and is your eyesight better? In other words, we tend first to ask narrowly about customer satisfaction, and then about unrealistically ambitious, short-term impact. There are many benefits to eating carrots. But the benefits are unlikely to be captured by evaluation consultants interviewing people who have recently eaten carrots, and even less by interviewing them a year later. In a similar way, a seminar needs to be considered part of a healthy diet of professional development, rather than being assessed in isolation.

Evaluations of training have typically identified two areas for assessment:

- Customer satisfaction: how did the student assess the training experience? Was it perceived immediately after, or later, as valuable?
- Usage: Did the student use skills or knowledge learned in the workshop on the job? Were they successful, for example, in writing a first grant proposal or doing a first budget?

Looking more closely at customer satisfaction, we can see the benefits as well as the limitations. For example, several years ago at CompassPoint we discovered that the most common complaint on our workshop evaluations was about the quality of the coffee. This was easy (if expensive!) to fix. We were able to improve customer satisfaction significantly—and contribute to a better overall experience—but of course, this doesn’t get at the heart of the value of the workshop.

At the same time, customer satisfaction *is* an authentic measure of success (if not the only one). The Fundraising School used to have a flyer that said, “We don’t say that our classes result in better fundraising results. Our clients do.” Co-author Jan recently attended a workshop on early-stage boards, and in her opinion, she learned a great deal and found herself challenged to think in new ways. Is it appropriate for an evaluator to tell her that despite her opinion, this was *not* an effective experience for her?

It can also be an error to focus narrowly on whether a participant uses the knowledge learned in a workshop. As an illustration, co-author Ken took a class in astronomy in

This workshop helped coalesce shreds of information that have been tossed at me, both formally and informally over the years. I am on the verge of an epiphany!
--Workshop participant

college, and he is not an astronomer today (although he did meet his wife in that class!). But—even if he hadn't met his wife there—does that mean that astronomy was a waste of time? In fact, Ken thinks that he is better at his job, better . as a community members, and certainly better as a husband.

Sometimes very valuable knowledge is used by choosing to avoid an unwise path. For example, co-author Jan took one of CompassPoint's classes class in PageMaker. One of the things she learned was that she should not use PageMaker. It’s possible to say that she uses what she learned in that class . . . every day (!).

If we take the KASA (Knowledge Attitude Skills Aspiration) approach to evaluating training, we can obtain a more complex, more useful understanding. In an experiment, we conducted a grounded evaluation of a recent conference on nonprofits & technology. We began by interviewing individuals over several months and asking them, “When you look back at the conference, what’s the first thing that comes to mind?” We pursued this track by asking about positive and negative impressions, then probing more on knowledge, skills, and networking outcomes. We were surprised that many participants found the conference an exhilarating experience—they reported on a new sense of enthusiasm and of camaraderie, of increased confidence negotiating with technology vendors, and a new perspective of the nonprofit sector as a leading market for technology. In short: without prompting, participants overwhelmingly chose changed attitude and changed aspiration as their primary outcomes.

Probing further, participants also reported increased knowledge—but not always the kind of knowledge we had anticipated. They did learn more about how databases work, for example, but they reported just as often that they had learned how different organizations approach database development. They did learn more about network

administration, but they also learned whether and how their organizations should be networked. They did learn new skills in digital imaging, but they also met other people of color in technology jobs.

At CompassPoint we are still experimenting and testing various ways of exploring all the outcomes of training, including:

- Changes in Knowledge, Attitude, Skills, and Aspiration
- Networking benefits beyond an immediate sense of value obtained (As one cool example, Craig Newmark of craigslist and Shari Steele of the Electronic Frontiers Foundation met at our Technology Conference . . . and three weeks later contacted each other to co-sponsor a national publicity campaign about electronic privacy.)
- Long-term impacts on departments and organizations that engage in various types of training for staff and volunteers
- Influences on the sector of having particular topics brought to their attention. [For example, many nonprofit executives and foundation program officers report that the availability of new training topics challenges them to think more broadly about what skills and knowledge are important to their jobs.]
- How high performing organizations use various types of training—such as one-day workshops and seminars, university certificate programs & degree programs, field-based training programs, experiential programs, leadership training, and participation in training programs for corporate and government executives.
- The degree to which training and other capacity building activities in an organization are linked.

In evaluating the multiple impacts of training, we can use many of the methodologies used now, such as surveys, follow-up interviews and tests. But understanding training's complexity, the survey will include questions that ask about attitude or aspirational changes, as well as about gains in knowledge. Follow-up interviews can contextualize the training experience by exploring what other kinds of training the individual and organization regularly use. We will also need to develop *new* methods: ones, for example, that look at correlations between training and career paths, or that compare employee morale at organizations with established training programs and at those without.

In short, training can and should be evaluated. But it must be evaluated rigorously as the complex intervention that it is. Objectives related to knowledge, attitude, skills and aspirations—and other impacts—must all be explored. And just as we observe healthy individuals to learn from their diets and behaviors, we should also look at effective organizations, and see how learning experiences of all kinds are developed and integrated into individual and group development.

The future of nonprofit training

One of the most exciting recent developments in the nonprofit sector has been the explosion of interest in developing learning communities, whether in small groups over time such as those of Eureka Communities, geographically distant colleagues such as the technology circuit riders, peer learning groups among, for example, new executive directors, organizational learning communities such as the California Management Assistance Partnership, or mentoring communities, such as one with both novice and experienced development directors of color.

All kinds of training are rightfully set in this rich context. Classroom training, conference session training, on-line learning, university-based programs, in-house training sessions . . . all are important opportunities for individuals to learn, and to be better managers, better case workers, better development directors, better board chairs, as a result.

And, as nonprofits struggle to find staff experienced in development, for example, more and more savvy executives are choosing to “grow our own.” Using a combination strategy of training, mentoring, and apprenticeship, many organizations are not only enhancing their own effectiveness, but training the diverse leaders of the future.

The Brookings Institution feels so strongly that training is an important investment that it has recommended that employee training be treated as an investment—as enhancing human capital and adding equity to the company—rather than as an expense.

*Unseen Wealth:
Understanding Intangible
Sources of Value, The
Brookings Institution, 2002*

We hope to see new thinking in many similar aspects of workforce development. We are excited by the development of coaching programs, especially those that help individuals gain the knowledge, skills and access they need through a variety of means. We are impressed with the degree of experimentation in e-learning, not as a substitute to classroom training, but as an adjunct or as an accessible alternative in rural areas.

Time after time, we hear nonprofits say, “People are our most important resource.” Dollars invested in training are, in fact, investments in people. Through creative training, people learn how to do their jobs better, gain broader perspective, heighten their aspirations for themselves and their organizations, and appreciate their organizations for investing in them. Training programs—*learning* programs—are one of the most highly

leveraged means for integrating staff with different skill levels and different backgrounds into effective teams. All of us are understandably eager not only to learn from our peers, but from those who know more than we do, or have more experience than we do, or have *different* experience than we do.

Omowale Satterwhite, one of California's foremost and most respected consultants to nonprofits of all types, recently attended a workshop on the basics of boards. When the teacher asked him why he was there, he responded, "All the important things I have learned in this field I have learned by sitting at the feet of the elders of our village . . . listening to them and learning. I learn something important at every workshop I go to, every person I talk to." Who among us could aspire to anything more?

About the authors

Jan Masaoka is the Executive Director of CompassPoint Nonprofit Services, a consultant and researcher, and the writer of the *Board Café*, a national newsletter for members of nonprofit boards. The Alliance for Nonprofit Management chose Jan for its keynote speaker ("A Capacity-Building Call to Arms") at their 2001 conference, and Jan has been recognized for three consecutive years by Nonprofit Times as one of the "Fifty Most Influential People" in the nonprofit sector nationwide.

Ken Goldstein, MPPA, is Silicon Valley Director for CompassPoint Nonprofit Services. Ken is formerly the executive director of Sustainable San Mateo County and the national Learning Community Director for HandsNet. A collection of Ken's short stories was recently published in *Aaron's Intifada*.

About CompassPoint Nonprofit Services

With offices in San Francisco and San José, CompassPoint Nonprofit Services is one of the nation's leading consulting and training firms serving nonprofit organizations. Through its 41 staff and hundreds of volunteer professionals, CompassPoint conducts research and provides consulting & training to nonprofits in executive transitions, fundraising, technology utilization, human resources strategic planning, nonprofit finance, boards of directors, strategic internet presence, and other topics. Last year 11,400 nonprofit staff and volunteers enrolled in CompassPoint's 700 workshops and six conference, and more than 300 nonprofit organizations chose CompassPoint as their consultants. In addition to workshops, consulting and research, CompassPoint publishes

three free electronic newsletters--*Food for Thought*, *Silicon Valley Food for Thought*, and the *Board Café*.

CompassPoint's newest service to the nonprofit sector is TrainingPoint.org, a free web forum where trainers of all kinds can share curriculum and training notes. Through TrainingPoint, CompassPoint has made its extensive technology curriculum and original-content manuals available for free to nonprofits, consultants and trainers.

CompassPoint's mission is *to increase the effectiveness and impact of individuals working and volunteering in the nonprofit sector.*

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