## **Cross Training**

Presented by:

Amanda Bierbrauer, Director of Student Financial Services, the Financial Wellness Center & Interim Director of Student Financial Aid and Scholarships, Portland State University

# Portland State





A public 4 year comprehensive university in downtown Portland, Oregon.

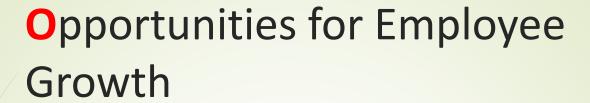
Annual headcount is near 27,000, 80% undergraduates, 64% transfer students, 63% receive financial aid.

#### **Cost Effective**

- Use of limited staff/resources
- Meets budget restraints
- Leverages technology
- Leverages employee proficiencies
- Increases productivity
- Lessens cost of new recruitment

# Reduces Customer Complaints

- Customer not bounced around for answer
- Lessens wait time
- > Ability for staff to answer multiple questions
- > Increases customer satisfaction



- Promotes qualified candidates
- Growth plan/management opportunities
- Develops/broadens skills

### **Staff Satisfaction**

- > Improves employee morale
- Increases motivation
- Reduces turnover
- Prevents job stagnation
- Increases staff engagement

# Sharing of Goals, Objectives and Ideas

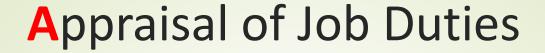
- > Increases staff engagement
- > Team vs Individual
- Departmental Goals
- > Institutional Goals

# Team Coverage for Time Off

- Vacation/sick days usage
- Promotes work/life balance
- > Lessens work to return to/frustration
- Employee absence does not reduce productivity

#### Reduce Workload

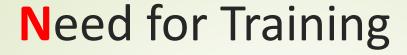
- Balance of work between staff
- Blend workforce and assign tasks
- > Better use of staff skills



- Know what staff does
- Update job description
- Prioritize duties



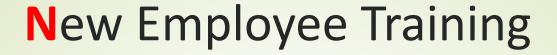
- Identify manual processes
- Prioritize which can be automated
- Better use of staff time and energy



- On Campus opportunities
- Staff professional development asks
- Career progression

#### Increases Morale

- Feels supported by team
- Reduces stress of absences
- Employee Engagement



- Draft Standard Operating Procedures
- Multiple Staff can Onboard
- > Resources

# Goals & Big Picture

- Lay of the Land
- > Set Priorities & Resources
- > Goals

### **CROSS TRAINING**

Questions & Comments?