

Staff Retention & Cross-Training Checklist

Pillar: The People • Prevention Continuity Playbook

Your staff is your most valuable asset. A funding disruption should not automatically trigger a staffing crisis. This checklist helps you proactively build a more resilient and flexible team.

A note for YOU: Building and sustaining a strong team is a significant responsibility. You are often the person thinking about who to recruit, how to develop talent, how to retain key people, and how to protect the organization through uncertainty. As you use this tool, remember that you need support, too. Identify a trusted mentor, peer, advisor, board member, or thought partner you can lean on as a sounding board for hard decisions.

Instructions: Review the following strategies with your leadership team. Check the boxes for actions you currently have in place.

Retention Strategies

- ☐ We have a clear and transparent communication plan for sharing organizational health updates with staff.
- ☐ We invest in professional development and certification opportunities for staff, even during tight budget cycles.
- ☐ Our compensation and benefits are benchmarked against similar organizations in our region.
- ☐ We conduct regular "stay interviews" to understand what keeps our top performers engaged.
- ☐ We offer non-monetary benefits like flexible work schedules or additional paid time off to boost morale.

Cross-Training Strategies

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- ☐ We have mapped the core competencies required for each program.
- ☐ We have identified at least one backup person for every critical organizational function (e.g., grant reporting, payroll).
- ☐ We have a formal plan to train staff in adjacent program areas.
- ☐ Staff are encouraged to shadow colleagues in different roles.
- ☐ Job descriptions are written to include flexibility and a percentage of time dedicated to supporting other initiatives.

Our Top 3 Priorities for This Year

Based on the checklist above, identify the top three new strategies your team will implement this year.

1.

2.

3.