Non-profit Case History

GeoMetrix Integrates Performance Management and Learning Management for a Non-profit Social Services Agency.

Sector:	Non-profit
Geography:	National
LMS Module Implemented:	2007
PM Module Implemented	2009
Employee Licensing:	1000
Administrator Licensing:	11

The mission of one of the USA's largest operating foundations focused entirely on the child welfare system is to provide and improve and ultimately prevent the need for foster care in the United States.

The national agency has decades of front-line experience in foster care and is committed to helping states, counties and tribes implement effective child welfare practices. The foundation provides nonpartisan research and technical expertise to child welfare system leaders, members of Congress and state legislators so they may craft laws and policies to better the lives of children in foster care, children at risk of entering the system and their families.

To accomplish its ambitious mission, the organization employs hundreds of workers in child and family services, system improvement, public policy, and administration working in every state. Managing employee development is critical to providing quality services, and many foundation employees require mandated training or certification.

The agency had a system for managing training for years, but it did not meet audit tracking requirements.

So at the end of 2006, the organization began searching for a new Learning Management System (LMS). Staff wanted a software application that could track individual employee training (in-person, online, external courses, certifications, etc.) and, in particular, direct-practice training to meet compliance requirements at all locations. The new LMS had to track on-the-job requirements, such as first aid and CPR training, while integrating with the existing HR/payroll system.

The purchasing process involved creating a requirements list, carrying out vendor research, short-listing finalists, and product demos. In the end, the foundation selected the LMS from GeoMetrix Data Systems and implemented the system in 2007. GeoMetrix was chosen because its product best met both issue escalation and inventory management needs with the least amount of customization. The project manager noted that the foundation "liked the simplicity of the interface and intuitive nature of [the software]."

Before the new LMS, the organization relied mainly on instructor-led training and administrator-based registration.
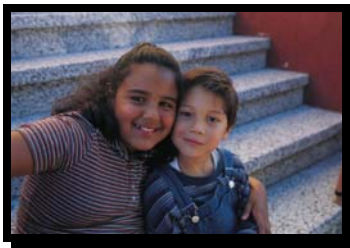
Geo**T**alent   *. . .the evolution of* **tp** TrainingPartner™
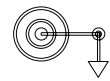
Implementing the LMS from GeoMetrix allowed the foundation to push enrollment responsibilities to learners using the Web-interface and to continually add e-learning to its system.

The implementation strategy was to provide only what was needed. "We had a minimalist approach in implementing. We turned on features only as the foundation asked for them."

GeoMetrix provides capabilities to cover all the needs of learning and performance management in any organization. To accommodate clients that do not wish such comprehensive functionality, the interface allows features to be disabled or hidden when not required. For example, the skills inventory was initially disabled for this organization. "We implemented the skills catalog in the summer of 2009. Currently, we use it for direct services staff only. There are specific competencies they are mandated to meet." The LMS can accommodate in-house and off-the-shelf competency libraries — including customized rating scales.

The reporting needs of the foundation were met by the hundreds of reports that come standard in software. "During our accreditation process, the peer reviewers were impressed that we could immediately provide any information on our classes, courses and orientation process that they requested."

With the addition of the LMS to its infrastructure, the agency had a system that could manage all of its learning management needs. But the foundation also had performance management requirements.

For years, performance management was done using paper and pencil. The organization tried to automate the process with an existing tool, but the system did not meet the organization's evolving needs.

So when GeoMetrix introduced a performance management module to its product line, the foundation was anxious to implement it.

Staff members were excited by the prospect of leveraging a performance management system that was designed to integrate with the LMS.

Goals and requirements included:

- ✓ Enforcing and tracking performance process compliance
- ✓ Streamlining the performance management process
- ✓ Cascading performance content to performance plans
- ✓ Linking development activities to performance content
- ✓ Identifying and managing performance plan disputes
- ✓ Rolling back performance plan steps when necessary
- ✓ Automating reminders

The new module was the answer to the foundation's performance management process woes. The former system could not handle basic requirements such as carry-forward goals or mid-year change of an employee's supervisor. But TrainingPartner addressed these and more.

Some examples of performance management reports include performance step status by step owner, performance plans that have been disputed, steps that are overdue by step owner, and completed performance appraisals.

"We never had the ability for that kind of analysis of training data, never mind performance management data."

Performance management is important to all staff since it relates to career growth and compensation. A business systems advisor for the foundation said there was an 85 percent participation rate out of the gate and almost full participation by mid-2010.

The organization has implemented configurations to make the product match its processes. Both the project manager and the business systems advisor were impressed by the highly configurable templates and work flow. "We've been able to do most everything ourselves. Our main changes were to the look and feel of the system, such as changing colors and terminology, as well as disabling various fields and tailoring the system to match our work flow and process rules."

The configurability of the work flow has been the most powerful feature.

When asked about working with GeoMetrix on this project, the project manager said, "GeoMetrix's support is tremendous. We're very happy. It has gone very well."

The business systems advisor, who worked on both the learning management and performance management implementations, said: "We really like the GeoMetrix technical support people. This has been one of the easiest projects I have ever been on in terms of implementation. Everyone was very accessible. I never felt like I was out there alone. We can always get someone and get an answer."

For more information visit: www.geotalent.com

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