HR Software Case Study

The Hospice cares for people of all ages who have a progressive life limiting illness and require palliative care. All services and facilities are provided free of charge to patients and their families. St Andrew’s Hospice and St Andrew’s Children’s Hospice’s services are available to anyone who needs specialist palliative care. In total, both organisations employ about 152 paid staff and 577 volunteers who give their time freely to help deliver our services.

St Andrew’s Adult Hospice provides day therapy for 64 adults each week and inpatient care for 8 patients at any one time. St Andrew’s Children’s Hospice provides day care for 20 patients each week and inpatient care for 4 patients at any one time.

The care we deliver is different to that which people usually experience in hospital. In many ways, we turn the clinical model on its head, because our focus is on not only the physical, but also the emotional, social and spiritual needs of patients and their families. We acknowledge that the person who is the best judge of what those needs are, is the patient themselves.

In addition to Day Care and In-Patient Care, the Hospice provides a wide range of services, which improve the quality of people’s lives, Complementary Therapies, Chaplaincy, Creative Therapy, Family Support, Physiotherapy, Animal Assisted Therapy, Music Therapy, Chiropody Clinics, Lymphoedema Clinics, Occupational Therapy and Beauty Treatments.

Care doesn’t stop when a patient dies – our structured bereavement support helps families through the start of the process of coming to terms with their loss.

Pre-Cascade

Before implementing Cascade our HR Department managed their processes using a combination of an existing Access database, and a number of spreadsheets. The procedures within the department were manual and time consuming, management information was difficult to collate and even simple data tasks were cumbersome to complete. There were concerns regarding the quality of the data that we had to work with and even when we produced reports we were not 100% confident with the accuracy of the information it represented.

All our documentation was held in a paper format, and in a number of cases especially with letters, multiple copies were created and stored in various locations creating duplication, this also made information difficult to update as it wasn’t clear that all the records had been captured.

Without a central database to work with, from which to use mail merge facilities, all our letters were created manually, for instance, entering each mailing address individually on 6 different documents, this created more work than necessary. Standard documents were difficult to maintain with users creating their own copies in their own areas, so any updates that were made were not reflected in the agreed template.

Due to the amount of spreadsheets created by a number of different users in various locations, there was a lot of data duplication and without having all the information stored in a central location, it would cause confusion.

There were a number of manual checklists in place to ensure that processes were being followed, again this generated a lot of paper which could easily get mislaid and was generally time consuming.

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The Challenge
We had no previous system to migrate from, our HR department was using a combination of paper, spreadsheets and a Fundraising database. Our new HR Manager was key in driving the project forward, having realised the benefits of using a system in her previous role. As a hospice funded purely from community donations, spending a substantial amount of money on a new system was something that would have to be considered carefully. After much discussion about the benefits that could be realised, our board of directors were happy for a feasibility study to be undertaken.

There were a number of key drivers for the project as detailed below:

• To hold all workforce data in one central easy to access system
• The elimination of repetitive data entry
• To reduce potential data entry errors incurred when entering and holding data in many spreadsheets
• To enable HR to monitor and audit information more efficiently
• To hold all absence records in one central place enabling an employee’s record history to be viewed on screen rather than many spreadsheets or paper documents
• To reduce repetitive administration tasks by introducing mail merge documents
• To produce accurate and more reliable management reports without manual intervention
• To track single or multiple recruitment applications electronically opposed to individual paper checklist held on personal file
• To access information available at a click of a button rather than searching through multiple documents and/or paper files
• The HR system feasibility study encompassed a number of key tasks within it and the team consisted of the Systems Co-ordinator and the HR Manager

Requirements Analysis
An analysis took place of the HR department and the procedures within it were broken down into a number of elements, each of these were subdivided into further requirements categories. Each of the categories were then analysed in detail to highlight specific needs for the system. Going through this process we produced our Detailed System Functional Requirements List, which provided us with a “big picture” reference of what it was we were looking for.

Process Mapping
As a team we identified the most important processes within the department e.g Recruitment, and used the BPMN mapping tool to document the steps involved, which also incorporated references to standard documents produced at all stages in the processes.

Requirements Scorecard
Following the requirement analysis we used a “scorecarding” tool to prioritise and weight each of our elements which would then be used to assess the supplier’s products.

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The Decision
We considered a number of key suppliers and from the 3 solutions we reviewed, we eventually chose Cascade as we felt it was the closest fit with our requirements, the key reasons below:

- Cascade was based on web based .Net technology removing the need for client software
- The Cascade company had a proven track record in specialist development of Human Resource solutions
- The Cascade HR product was clearly a flexible and highly customisable product which could be easily adapted to a user’s requirements
- Cascade already had a client base of other charities
- The company is situated in a central northern location, i.e. easy access to user groups etc
- The Cascade staff we dealt with prior to making a decision were professional and very knowledgeable of their products
- The Cascade product is modular allowing us to grow easily with the product over time

Key Functionality
We could see that the workflow functionality would replace a majority of our manual checklists, and provide an automated back bone to the HR department to ensure that key tasks would not be missed by our team.

The recruitment module offered the capability to create a structured and standardised process, through which both our volunteer and employee recruitment could take place. We were impressed with how we could build up a detailed process with all the relevant recruitment documentation defined within it.

We were very surprised how easy the report writer was to use, it was a powerful and flexible tool within the product itself which allowed the creation of calculated fields with the addition of easy to use but highly effective graphing facilities.

Being able to modify key screens and also create new ones easily was a key requirement, Cascade allows us to do this simply and at the same time the process to upload data into new screens was very straightforward.

The level of security management within the product was very detailed but at the same time it was easy to administer, we were very keen for a product to have field level security which Cascade offers.

The Project
Our Project Manager worked very closely with us during the course of the implementation project, we felt that we were being guided along a tried and tested path.

The Cascade team were very professional, communicating effectively, with a structured approach that provided us with the key documents that helped us along the process.

The project documents detailed the key milestones and the scheduled target dates for completion which were met on time and within budget.

Our requirements were very clear having carried out our feasibility study, and Cascade’s flexible approach enabled the training to be focused and tailored towards our environment. The benefits of this were that we could use some of the training session time to configure and set up parts of our system as we went along. The training was very clear and delivered professionally with confidence, we felt we learnt the key skills easily.

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because of this, and we came away with a firm grounding in the use of the product.

During the live training sessions there were a number of questions that were raised which were quickly followed up by our trainer, we found that answers were provided by the support team very quickly and any bespoke tweaks that were needed to be made along the way were auctioned without any problem.

Benefits Realised

Cascade has provided us with a centralised and auditable recruitment process, typically before Cascade the administration involved in producing documentation for each applicant would take an hour, this now takes only 10 minutes using the Recruitment module on Cascade.

Cascade has allowed us to bring together a number of manual checks within the Workflow capability, e.g. Criminal Records Bureau, Professional Registrations and Driving Document checks. The workflow functionality has allowed our processes to be more controlled, our HR team members can easily see at what stage certain processes are at using the Task List screen. It has also improved communication within the team.

We have developed a large number of reports within the Report Writer which now give us immediate access to the data we require. It has dramatically reduced the time taken to obtain the information as this was previously collated from a combination of spreadsheets and manual paper files. Individual Ad hoc requests for specific information can be easily completed in a timely manner and delivered to the user whilst the information is still current.

As a substantial amount of time in the HR department is administration based, the ability to mail merge documents from central database records has significantly reduced the amount of time to produce letters. The ability to store a letter against an employee record cuts out the need to store a paper copy in a separate file.

The Self Service functionality has given our line managers access to a great wealth of information which would normally be stored away in a paper file within the HR department, this greatly increases their productivity.

“The Self Service functionality has given our line managers access to a great wealth of information”
Summary

Implementing the Cascade HR solution has greatly improved productivity in our HR department. We continue to solve a number of problems and increase the use of the system across the organisation. We’re confident that Cascade HR will continue to develop in the future and over time further deliver its return on the investment made.

Cascade HR enables the HR department to be more visible and proactive across the rest of the organisation, rather than it being a department “locked away” in a building.

There are number of ways that certain processes have been streamlined as below:-

- It provides an electronic “To Do” list via the Task List screen
- Updates to employee records can be made whilst the employee is still on the phone
- Documents can be scanned, easily attached to records and then destroyed
- Absence can be easily managed without too much paperwork
- Looking through paper files for information no longer happens
- We can get summary information about where our applicants have seen our job advertisements
- Productivity of the HR team can be measured

We see the benefits of having implemented Cascade HR on a daily basis, we now take for granted a number of things which were a struggle in the past. We would easily recommend the product to any other organisation, in fact, we recently worked with St Barnabas Hospice based in Lincoln who purchased the product following our recommendation and a visit to our site.

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