

# *SSA Learn:* A Learning Management System for Santa Clara County

PETER K. BARRETT

## EXECUTIVE SUMMARY

In 2007, Santa Clara County was considering the development of a human resources management system for all of the agencies in the county as a way to centralize essential data for county employees, particularly as it pertained to personnel, payroll and staff development. Simultaneously, one of the county agencies, the Social Services Agency (SSA), was considering the use of a learning management system as a solution to problems posed by changes in regulations that required more extensive tracking of training. The county and SSA worked collaboratively to explore various options that might serve their mutual needs; however, because of the timelines dictated by

the regulations, SSA decided to proceed as the first agency within the county to implement a learning management system for itself. SSA selected a Project Manager and formed an intra-agency implementation team to develop a learning management system that would meet SSA's needs. *SSA Learn*, as it is known, has operated successfully since August 2009. It provides a wide assortment of tools to improve the data management of staff development functions for the agency. Sonoma County is eager to learn from that experience to inform its own implementation of an eLearning\* program and possibly, of a learning management system.

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\*eLearning includes a variety of electronically-based teaching and learning modes. It is a term often used to refer to training that is outside of the typical classroom. eLearning is essentially a computer-based and network-enabled transfer of skills and knowledge. It can be self-paced or instructor-led, synchronous or asynchronous. It may incorporate a variety of media, including text, graphics, animation, audio, and video. Other terms that are sometimes used as synonyms include online training, computer-based training, internet-based training, and Web-based training. Examples of eLearning include webinars, virtual classrooms, and distance learning. eLearning will be the term used throughout this paper.



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*“Today’s reality is that you must surround people with both structured and unstructured learning experiences—combining formal and compliance learning with informal and collaborative learning—so they are empowered to rapidly access precisely what they need to learn, and motivated to want to learn.”*

## Introduction

SSA Learn is a commercial learning management system (LMS) that was purchased by the Social Services Agency of Santa Clara County, partially in response to regulation changes by the California Department of Social Services (CDSS). These changes placed new expectations on county agencies to provide, track and report trainings provided to child welfare staff. Effective July 1, 2008, each county became responsible for insuring that all newly hired child welfare workers complete a CORE program of classes specified by CDSS to promote competencies within the field. Additionally, the new regulations required experienced social workers and supervisors to undertake a minimum of 40 hours of continuing education training every two years. Compliance with these training requirements is reported to CDSS in the Annual County Training Plan.

Prior to this change, Santa Clara County’s Social Services Agency (SSA) had provided the data to CDSS using other data management systems. The county had previously purchased *People Soft* for Human Resources and payroll system functions. *People Soft* has some LMS capabilities; however, the detail of data needed to comply with the new regulations compelled the agency to seek a more

efficient way of tracking training. In 2007, Santa Clara County arranged for several vendors to deliver live demonstrations of their learning management systems to a group that included SSA management team members. After these demonstrations and with considerable deliberation, the county chose not to proceed with an LMS at that time. However, SSA continued to explore implementation of an LMS to address the dilemma posed by the new CDSS regulations.

A Learning Management System is a software application built to deliver trainings, as well as to document, track, and report data from trainings held in classrooms or online. Every LMS is different. Learning Management Systems often begin with a vendor-created package of standard tools that are then customized by the learning organization to achieve its stated goals. An LMS usually includes a catalog of classes with descriptions. eLearning classes may be only one part of this catalog, as there may also be classroom training that is included. Other tools that may be included in an LMS are an online registration system, a checklist for tracking course completion (a course is a series of related classes, such as CORE), a method for generating self-service transcripts, a tool for scheduling classes and reserving training rooms, and a solution for reporting compliance with state regulations.

A more robust LMS can include tools for job competency management, skills-gap analysis, succession planning, and testing and evaluation of course content. The field of LMS development is constantly expanding to provide more comprehensive, efficient, cost-saving functionality for organizations.

At the same time that SSA recognized the need for a learning management system to help with tracking and reporting completion of mandated child welfare training to the CDSS, they also identified other valuable goals for their LMS. Agency executives wanted their LMS to:

- establish a central repository for data related to staff development
- establish a comprehensive catalog of SSA course offerings with course descriptions
- provide online registration capability making the process simpler and faster
- generate reports of staff participation in training
- track mandatory training requirements needed by the agency, CDSS and other licensing and regulatory agencies
- provide transcripts to employees as needed
- provide employees with multiple modalities in which to receive training (e.g. classroom, online, self-paced, distance learning)
- make the most efficient use of training staff
- assess, measure and develop the skills of employees
- identify gaps in job performance and guide employees toward proper and effective training to address the gaps

Gina Sessions, the newly appointed Acting Director of the Santa Clara County Social Services Agency, believes that a better trained staff will be a more competent staff and that the customers who are served by those employees will reap the benefits.

## Implementation

SSA began planning its LMS implementation in 2007 under the direction of Gina Sessions, former SSA Operations Department Director (and current Acting Director of the Santa Clara County Social Services Agency), and Mary Shamouel, SSA Information Systems Director. These two directors became the leaders of the Executive Oversight Committee. One of their first steps was to appoint Adesh Siddhu, Director of Applications and Business Developments, as the Project Manager of the LMS project that came to be known as *SSA Learn*. An initial

implementation team was formed that was led by the Project Manager and Barbara Sasaki, Staff Development Manager. This initial team also included the Santa Clara County Training Manager and Senior Trainers from the SSA Staff Development office.

The initial implementation team met regularly for many months to draft an RFP for the project. The team also created two Functional Requirements Checklists that contained 216 specifications of the functions and features that were desired in the LMS. The team made numerous decisions during this planning phase regarding cost, functionality, interfacing with other systems, and training content. The RFP was issued and the contract was awarded to SABA, a worldwide company providing performance management, learning management systems and other technological support on an application platform. SABA began working immediately with an expanded implementation team that included trainers and supervisors from the other departments of SSA (Aging & Adult Services, Employment & Benefit Services, and Family & Children Services), two representatives from the SSA Information Systems Help Desk, and the initial implementation team members. The make-up of this team was intended to be broad in its representation of the agency to gather input from branches and end-users at all levels.

During the period from January 2009 to May 2009, the team learned how the system operated, made decisions about the LMS including naming and numbering conventions and access levels, and worked with other parts of the agency and county to ensure a successful interface with their Human Resources database of employees. In May 2009, user acceptance testing (UAT) was conducted. The implementation team drafted UAT scripts which were used by selected supervisors, managers and line staff to test if the LMS functioned as designed. This careful and time-intensive testing phase was a critical factor in the ultimate success of *SSA Learn*.

An early decision made by the implementation team was to purchase an array of classes from SkillSoft, a provider of on-demand training and eLearn-

ing solutions to government agencies, businesses and educational institutions. The SSA team was able to build a library of eLearning classes that were informative, relevant, and fun for employees, while at the same time addressing some of the learning gaps that existed.

The utilization of SkillSoft classes became an easy first step for many cautious end-users. They were introduced to online registration for these classes. They were free to pick and choose among a library of classes that were made available to them. All participation was voluntary. The classes covered a broad range of “soft” topics including communication skills, professional writing, time management, and improving work relationships. In addition, SkillSoft offered classes in some of the Microsoft Office Suite programs such as Word, Excel, and PowerPoint. These classes were widely accessed by SSA employees.

Adesh Siddhu spoke of the implementation of *SSA Learn* as a significant cultural change for the Social Services Agency. All levels of the organization began to perceive the agency as a learning organization. There was a considerable learning curve for many employees, especially those who had previously only known classroom trainings. He noted that a substantial amount of time and effort was put into proper marketing of the new system to allay staff fears and to help prepare for expected slowdowns in work production that are typical with any major business practice change.

Although there are still pockets of resistance after two years of operation, many employees have embraced *SSA Learn* and have made good use of the online classes that are offered to improve their work-related knowledge and skills.

### **Program Effectiveness**

A formal program evaluation has not been conducted yet, nor has the agency had resources available to pursue a cost-benefit analysis of the *SSA Learn* program; however, Barbara Sasaki (Manager of SSA Staff Development) has stated that after nearly two years of use, she considers *SSA Learn* to be a success.

Since implementation, *SSA Learn* has achieved most of the goals listed previously in this report.

Ninety-percent of the registrations for instructor-led and eLearning SSA trainings are now done online in *SSA Learn*. What used to be a labor-intensive clerical process of registration, confirmation, sign-in, tracking, reporting and providing certificates of completion is now performed within the LMS. According to Staff Development Manager Barbara Sasaki, this has led to a significant savings in staff time.

*SSA Learn* has a training catalog that includes eLearning and classroom training; however, approximately 85% of the training currently provided to SSA employees is instructor-led training in a classroom. Ms. Sasaki anticipates this percentage will change as employees gain ease with taking online classes and as Staff Development trainers become more proficient in transitioning their classroom curricula to the eLearning milieu. In particular, the agency is interested in expanding its use of webinars and distance learning as training delivery options. This will require the purchase of additional hardware.

### **Implications for Sonoma County Human Services Department**

The Sonoma County Human Services Department (SCHSD) entered Phase II of its performance management process, “The Gold Standard,” on February 1, 2011. The purpose of The Gold Standard is to develop performance standards that foster a high level of service quality and that facilitate job performance evaluations that are consistent and fair. The implementation of an LMS is particularly relevant and timely for the department as they seek to develop a strategic approach to improving employee performance through training and other means that will increase employee capabilities.

An LMS can be the solution for gathering data directly related to job performance measurement, integrating that data, and making it available for analysis within a performance management system. As an organization looks at the job performance of its employees and then develops criteria to evaluate

competencies within each specific job assignment, tools are needed to provide objective measurements. These tools emerge through recognition by department employees of the critical skills and knowledge needed to meet competency levels. They can be incorporated into an LMS and lead to an overlay of data fields that can address issues, such as competency gaps, training needs, transfers, promotions, and succession planning. Employees at all levels in the organizational structure can experience the benefit.

Sonoma County has recently launched a human resources management system (HRMS) known as ePersonality. This system, developed by High Line Corporation, is still in its infancy in the county. The details of what ePersonality will look like, what functions it will perform, and how it will interact with each of the county departments have not yet been determined. Typically, however, an HRMS can provide an organization with solutions for payroll, benefits, recruiting, forecasting labor-related costs, performance evaluations, accident and injury reporting, complaint and grievance analysis, salary survey comparative data, training, and more. In many organizations, implementation of an HRMS has proven to create a significant reduction in the manual workload necessary to maintain these multiple administrative tasks. Led by an interdepartmental team of human resources executives and information technology experts, this ePersonality HRMS will eventually serve all or most of the county's departments.

It remains to be seen how ePersonality will interface with external systems. In the staff development program there is significant data overlap with UC Davis and the Bay Area Academy, as well as with the Sonoma County online registration system known as SCORS. SCHSD currently tracks its training through an internally developed database that comes out of the county's payroll database. If the department is considering implementation of an LMS, it will be useful to consider the integration of these systems well in advance. Data migration, for example, may be better served by a department-based, rather than a county-based system.

## Recommendations

As Sonoma County Human Services looks to the future and its development of staff, embracing a thoughtful, comprehensive, user-friendly learning management system will be the key to success. Building on the experience of the Santa Clara County *SSA Learn* Implementation Team, these five recommendations offer paths for Sonoma County to follow in developing eLearning and a robust learning management system.

- 1 Careful planning at the outset. Be sure that the development process is receiving information from all levels of the department and ensure that all divisions and external stakeholders have ample opportunity to provide input. This helps to refine the functional requirements checklist that becomes a fundamental document for discussion with the vendor who delivers the end product. Look closely at vendors, their history, their ability to adapt and customize, and the support that they will provide during development and implementation of a new LMS. Expect several thorough demonstrations of the variety of functions that a good LMS can and should provide prior to concluding the contract. Be especially mindful of the reports that can be generated by the system to ensure that necessary analytical data will be available.
- 2 Market, market, market. Project Manager Sidhu spoke at length about the cultural shift that must occur at all levels of the organization for the adoption of an LMS to be successful. Early "buy-in" in the development phase will minimize resistance as the program unfolds. Sonoma County should enlist participation from all divisions and invite employees at various levels of computer competency for input to ensure maximum utilization as the project is implemented. If employees grow to embrace the concept of self-service, where they can register online, take classes on their own accord, and be self-motivated to develop their potential and imagine their professional growth within their work

environment, then the department and the customers it serves will benefit.

- 3 Build a strong implementation team with broad representation and significant experience in information technology, human resources, and staff development. Select a confident, knowledgeable, committed project manager with good communication skills and a clear vision and understanding of the department's goals for the system. Identify key leaders in the department who will maintain ongoing expertise in the system.
- 4 Plan for an LMS that can serve as a bridge between the current training database and the incoming HRMS. Identify potential gaps between their interactions and select the system that will minimize those gaps, improve migration of data and ease the transition. Communicate early and often with County representatives and other stakeholders about the development process.
- 5 Be thoughtful in determining what learning content is best suited to eLearning. There will be much training for which eLearning would be an ineffective method of delivery. Start slowly, introduce simple navigation exercises, institute a strong Help Desk function, and offer user-friendly, off-the-shelf classes at first. This approach allowed Santa Clara County SSA sufficient time to address the resistance that emerged initially. It also gave their staff development personnel time to adapt their classroom curricula to a format that was compatible with eLearning. The employees have been able to embrace and appreciate some of the features of eLearning. This has aided in their acceptance of self-initiative as a model for their development as employees of the agency.

## Acknowledgements

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