



CUSTOMER PROFILE

Performance Manager™ helps The Carle Foundation adopt an “I CARE” attitude

The Carle Foundation is a not-for-profit, locally owned and operated parent company which manages Carle Foundation Hospital and other Carle healthcare services. For more than 75 years, The Carle Foundation has stayed true to its mission of improving the health of the central Illinois community by providing compassionate, patient-centered health care, coupled with state-of-the-art medical treatment, life-saving emergency services, and proactive health education programs. Core to its success is the dedication to their “I CARE” values created by the employees. “I CARE” is an acronym for Integrity, Collaboration, Accountability, Respect and Excellence. Because adopting these corporate values require more than words, in 2008 Carle sought to institutionalize these values through the adoption of HealthcareSource Performance Manager to manage the employee performance appraisal process.

The push to excellence

In 2004, Carle Foundation purchased and installed a Human Resource Information System, after many years of using paper. While the system provided many benefits, they realized it was not going to do everything for them, especially in the area of recruitment and performance management. “While our Information Technology group built a job description database and homegrown job appraisal form, we still struggled with standalone systems that didn’t integrate, had no electronic employee file, and we were still buried in paper,” said Jody

Swearingen, Manager of Compensation and HRIS. “We only had a partial system.”

Initially focused on recruiting, Carle Foundation looked at numerous software solutions and chose HealthcareSource Position Manager® for applicant tracking. Through this process, they learned of HealthcareSource Performance Manager for performance appraisals, competencies and learning. “The choice was easy. We went with Performance Manager because we wanted as much integration and as few vendors as possible,” said Fern Eheart, HRIS analyst.

The value of Performance Manager

The Carle Foundation wanted to focus on the fundamentals. “It’s easy to lose sight of what the evaluation process is all about,” added Swearingen. “My goal is to make it as streamlined and easy as possible, so managers and employees can spend time and energy on the exchange of information rather than on paperwork. Having something that is straight forward, easy, helps you communicate with employees, and tracks progress all year long supports that.”

Carle liked the fact that the software was very straightforward and very similar to how they did work before automation, which helped speed adoption. “We liked that it incorporated self-evaluation, peer-evaluations, and manager-evaluations. Self-evaluation is very important to us, and we have it done prior to manager evaluation. We believe it creates an environment of enhanced manager-



About The Carle Foundation and Carle Foundation Hospital

Location: Urbana, Illinois

Specialties: Not-for-profit teaching hospital. The area’s only Level I Trauma Center and Level III Perinatal Service

Mission: We serve people through high quality care, medical research and education.

Adopting an “I CARE” attitude through technology

Employees: Close to 3,000

HealthcareSource Solutions: Performance Manager®, Position Manager®



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employee relationship, follow up and professional exchange, and helps the employee feel an added sense of value," explained Swearingen.

"Complete and timely evaluations have been a focus at Carle for a long time, and our VPs hold management accountable," according to Eheart. "Performance Manager will improve our tracking and reporting mechanisms as well as reduce manual entry of data and filing of paper documents. Managers like the real-time reporting. They no longer have to wait for the HR Weekly Report to come out to see if their paper evaluations made it to our off-site HR department. They know instantly when they complete it online – it will be reported as complete."

Swearingen appreciates the Goal Management features. She explained the importance, "It's been quite a paradigm shift for managers as our goals have always been part of the evaluation form. Once they get used to setting goals independent of the evaluation, they love it. It is right in front of them now, facilitating year round monitoring and follow up on progress. Getting organizational goals tied to individual goals and managing them is time consuming to implement, but the software makes it possible, and we think that this is what employee development is all about. It will help us meet our overall mission."

Carle is excited about the ability to better manage Joint Commission audits. The system will help them confirm that an employee has reviewed their job description, and that they have had a performance review. In fact, this data is now up to the minute. In the past if they

wanted to see a file on an employee that just had something done, there was lag time and the necessity to get it from their department. "Now, we can give surveyors access to the system and know it is there," said Swearingen.

Carle also loves that the software is so tailored for healthcare, with an appreciation for the requirements of The Joint Commission and CARF. They have found the software makes it easier for managers to have input on job descriptions. They also believe it will support employee retention, by having one system for appraisals, competency and training.

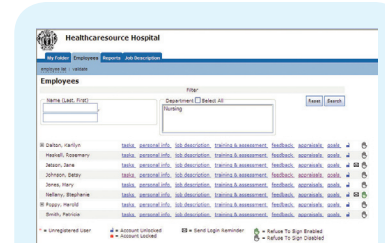
The implementation

The Carle Foundation has taken the implementation in phases. First, they created pilot teams: they chose some departments they knew would be simplistic, some they knew would be more challenging, and some that were very complex. This especially helped them troubleshoot. It also allowed them to provide more personal support and hand holding.

After the pilot teams, they are rolling out additional departments. "HealthcareSource services is very responsive and are both able and willing to help us. If we call with a problem, they are all over it. They are willing to hear what we have to say, and if something is not there, they come up with a way to accomplish what we need to do," said Eheart. "We always get what we need done. We especially appreciate that because we strive to be a customer service department – the reason we put the software in was to help managers and directors."

HealthcareSource is the leader in talent management solutions for healthcare, used at over 1,000 healthcare facilities. We help healthcare organizations acquire, develop and retain the best workforce possible in order to maximize the quality and efficiency of patient care. HealthcareSource Software-as-a-Service solutions include applicant tracking, onboarding, performance management and the leading healthcare Internet job board. We focus exclusively on healthcare, are an established and financially strong company, and have 98%+ customer satisfaction and retention.

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Performance Manager is an easy to use and quick to implement performance management system for healthcare.

- **Performance Appraisals:** Process is automated and paperless. Appraisals, goal setting, and job history are available online.
- **Competency Management:** Online checklist that can be accessed anytime, anywhere by managers, educators, and preceptors.
- **Learning Management:** Tracks and maintains compliance while managing immediate and ongoing training requirements.
- **Talent Performance:** Includes over 30 standard reports that help measure manager and employee effectiveness.



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