Global solution implemented for OMF International to better manage people and communicate across the organization.

Back in 2007, a global non-profit organization with about 2000 members, staff and volunteers, wanted to implement a global personnel solution and other services across 20+ countries and five continents. They are now seeing significant savings and efficiencies each year.

In 2010 Khalibre was formed out of the original non-profit organization as a separate business and IT services company. The purpose: Enable more non-profit organizations to gain significant savings and efficiencies.

What is different about Khalibre from any other IT services organization or even an internal IT department within a non-profit organization?

The meaning of the name helps to explain the difference. KH is the ISO code for Cambodia and the spin on Calibre is simple enough – high calibre people. The meaning of the word in middle English means to 'shape' or to 'mould'. This is exactly what we want to do in Cambodia. Shape and mould professional IT and business people and build community.

In this way we share the values of the non-profits that we want to work with as we invest in the Khmer people.

How do we operate?

We bring together international expertise and the best local talent. We invest heavily in good process, learning frameworks and quality management to provide consistent, high quality IT solutions. We build expertise through large global projects. From this strong foundation we seek to deliver excellent solutions for large organizations. And of course, our choice of location ensures we can deliver world class solutions at great value.

The Challenge

OMF International is an affiliation of national organizations with limited central control.   At the outset it was recognized that achieving successful change within a diffuse voluntary organization would be difficult.

The organization recognised they must get a grip of their people information in order to manage effectively and care for their people who often work in very difficult circumstances.

The vision of the organization was to grow by 30% in the next five years. How could they achieve this with the current foundation?

It took three months to gather people information that was often inaccurate by the time it was compiled.   People joining the organization were asked the same personnel questions three of four different times to their frustration and very often with different results!

The Response

Some of the large countries planned to invest in their own national solutions due to the complexity of their issues.   However, this piece meal approach was understood to be ineffective with a global team. This was becoming clearly recognised as countries shared global processes and struggled to get them to work effectively together. An international strategy was needed.   This comprised of three key elements:

1) **Understanding Today**— Quality information about people and processes at the finger tips of those who needed it . Key decision makers in the field.

2) **Facilitating Future growth**—Providing an administration system that facilitates the complex global mobilization process in a seamless manner. As well as allowing Mobilization from countries without an OMF office such as Finland!

3) **Developing the membership**—Ensuring that the essential 'DNA' of the organization is maintained as desired as the organization grows, whilst also improving the ability of people to get the work done. Achieved by providing a learning management system with the capacity to deliver on-line training.

Key Organization Objectives:

These were summarized as:
- Enable more effective use of resources
- Support organization growth
- Reduce administration costs
- Streamline HR processes
- Sustainable delivery

Solution

At the inception of the project there was no particular set of software solutions envisioned. It was recognized however that the solution must be highly configurable, scalable, do much of the complex work out of the box, support many languages and work with the major operating systems and browsers.   And of course, perform well from any country in the world! For the simple reason that international voluntary organizations are very diverse and OMF expects to grow.

Personnel Administration / Organization Management

A global view of the organization was created with SAP Organization Management. This provided consistent structure to the roles people performed throughout the organization. The key categories of relationship to the organization such as staff, retirees and volunteers were captured and tracked on an on-going basis. With a customized tool such as Directory Service and manager reporting this information can be accessed as required in real-time.

Self-Services

A key tenet of the solution is to provide the ability for all staff and members to maintain their own data. The principle is that the best person to maintain current information about an individual is the individual themselves.   Tailor made solutions such as personal data checker, compliance and confidentiality agreements ensure that individuals are careful to maintain their own information and personal security.

Individuals may also review their financial and insurance information online such as donations received. Team leaders are able to review their team members infor-

mation and review and approve leave requests. As the organization grows OMF is not adding any more administrative staff and are actually seeing some reductions in staff numbers which contributes to significant savings now being realised.

Medical Administration

The medical team are now able to see the information of their patients from anywhere in the world in a secure manner. This improves medical response and is particularly important where time is of the essence in a medical emergency. Specific tailoring for 'walking blood bank' and other OMF policies were implemented demonstrating the flexibility of the underlying technical platform.

The medical process commences from initial application through the life-cycle of a family's relationship with OMF.   This is a little unusual for most organizations!

Learning Management Solution (LMS)

The LMS provides a clear view of all internal training available across the organization. This has helped OMF better understand training needs and enabled end-users to be aware of training that was previously invisible. Very often in a non-profit organization there is significant turn-over in support roles and a person may undertake many different roles. To enable the organization to work well and deliver services to a high standard people need to be trained to do their jobs.

The LMS helps to administer this training and show managers who has what training in their teams. This enables many different types of content to be delivered to an audience in many parts of the world simultaneously through web based training or virtual classrooms.

This solution is being expanded to include learners external to OMF such as candidates, short-termers and partner organizations. We believe this adds to the richness of the learning community.

Mobilization

A global mobilization solution was implemented for both long term and short-term workers.

These have very different selection processes as well as local needs. The solution enabled these different processes to be implemented whilst not rail-roading people to a fixed set of activities. This flexibility was very important as different national organizations had different capabilities and legal frameworks to operate in.

A candidate centric process means that candidates can drive their own selection process through a web portal. For example, they are able to view opportunities, know who to contact to move forward their application, can see pledges raised on their behalf, what stages of the process are yet to complete …. This allows time to be focused on relationship building rather than administration.

A supporter can now be tracked from the stage of 'passing interest' to committed worker and through to retirement! This stream-lined end to end process maximises efficiency for the candidate and personnel administration processes.

As an example email correspondence requesting updates on the progress of candidates through the system has dropped significantly as this information is available to the whole team on demand.

'We need a joined up international mobilization and candidate coordination process. Where potential candidates are not being asked for the same information again and again.'
Mobilizer OMF JMCC Conference 2007

This comprehensive approach towards mobilization is bringing clarity to the process and helping to ensure that there is effective follow up on interested parties.

Pastoral Care Reviews and Work Reviews

A global solution has been implemented for pastoral care reviews. This is ensuring that reviews take place in a timely manner with consistency in process, and provides accountability to individual personal development objectives such as progress in language, culture and spiritual growth. The information gathered allows leadership to analyze organizational trends for decision making. This is now being extended to work review with an approach that encourages self-review around team and personal objectives.

Secure Global Communication

It is all well and good creating a secure environment for personnel, medical and candidate data. Discussion around that data via email also needs to take place in a secure environment.

Secure Email and Calendaring

All the solutions encourage communication within the system. But at times information must be communicated with email. So as to avoid a 'big hole' in security a secure global email and calendaring solution was implemented .

Intranet

To encourage more communication within the solution an intranet with document sharing, wikis, forums and other collaboration tools were implemented.

Secure Computing

OMF needs all staff and members that work with confidential information to implement secure computing from a legal perspective.

Secure computing requires good communication AND follow-up to make sure that this does take place. In conjunction with education, a security compliance, audit and secure communication support service was implemented.

Sustainable Solution

OMF was concerned they were buying into a solution that would force them to pay large on-going consultancy costs. The reason being that they must respond to changes imposed upon them by the outside world as well as internal. For example, data protection, security standards, communication media, organization structures, project funding, and tax regimes. As a result solutions that are implemented must constantly be updated to meet these challenges. A sustainable solution was needed for this problem.

Khalibre provided solutions in a number of ways:

- Feasibility and implementation services which require strong project management to ensure schedule, cost and quality control.
- Organization design with implementation of a Center of Excellence and global support process.
- Support services for on-going minor changes and issue resolution.
- On-shore and Off-Shore services - To provide the right balance between understanding customer needs and minimizing the costs.

And most importantly with a value based approach compatible with non-profits.

Key Organization Outcomes

OMF conducted an independent review of savings and confirmed that they are seeing significant savings. The organization is now the largest it has ever been in it's 148 year history. Staff administration costs are falling and with continued implementation the annual benefits will continue to grow. Furthermore the solution is now seen as a key tool for facilitating future change as OMF conducts strategic organization reviews.

'IPS—Connecting People project implementation has enabled us to reduce the number of databases that we have, with much less repeated data entry saving time, effort, expense and increasing data quality.'

Stephen Griffiths—International Director For Personnel

One senior leader noted:

'We have moved towards being a global team that makes more informed decisions, based on rapidly available information. Our people processes are better understood, and as they are embedded in a system, the focus is more on interpreting and using the information captured through a process than the effort of running the process itself. What this means is fewer, better informed staff supporting our members more effectively.'

'One of our young mobilizers excitedly told me, 'We're addicted to this— and that's a good thing.

Jon Fuller—International Director For Mobilization

Some Technology Highlights

A brief summary of the platform implemented for OMF, some aspects not included for security reasons.

- Microsoft Server platform using Active Directory for Single Sign On.
- Microsoft Exchange 2010 with custom security for identity protection.
- The SAP solution implemented was ERP 6.0 on SQL Server. This includes Human Capital Management, Financials and SAP Netweaver Portal.
- For performant global access web accelerators were implemented in different regions
- Reporting and management dashboards are delivered with a search engine service for fast real-time reporting of information.
- SAP enterprise learning environment was implemented with Adobe Connect Pro , Articulate and Adobe Captivate solutions.
- All the services were implemented with high availability, 24 * 7 support and security in mind.
- Please email for more information.