



SEIU 775 Benefits Group automates scheduling and reporting and provides better caregiver training with Smartsheet

SEIU 775 Benefits Group, based in Seattle, Washington, provides training, job matching, healthcare, and retirement benefits for nearly 50,000 caregivers across Washington state. The organization's mission is to improve the skills, health, and stability of the caregiving workforce through innovation and high-quality benefits and programs.



Customer:

SEIU 775 Benefits Group

Industry:

Nonprofit

Organization Size:

Medium (50 - 999 employees)

Region:

North America

Website:

myseiubenefits.org



With Smartsheet, we can spend our time being more productive. That aligns with our organization's work of creating impact, not work, and helping caregivers do their jobs better.



Krystle McMaster, Senior Logistics and Scheduling Program Lead, SEIU 775 Benefits Group

Nearly 50,000 caregivers across Washington state rely on training and benefits provided by SEIU 775 Benefits Group. The organization offers skills-based training, job matching, comprehensive healthcare, and secure retirement benefits for people who work as caregivers for aging adults and individuals with disabilities. SEIU 775 Benefits Group also partners with employers and industry vendors to accomplish its caregiver support mission.

Background

The organization's Logistics and Scheduling team uses Smartsheet software to manage training delivery projects, track learning events within class sessions, and verify attendance for virtual and in-person caregiver classes. *"Smartsheet makes our lives easier through automation, and that means we can make caregivers' lives easier as well,"* says Sarah Purdy, attendance program coordinator for SEIU 775 Benefits Group.

One of the organization's goals is to give caregivers easy access to training and associated materials, regardless of location. *"We are trying to elevate the lives of the people who are taking care of others,"* says Krystle McMaster, senior logistics and scheduling program lead for SEIU 775 Benefits Group. To do that, SEIU 775 Benefits Group needs to provide updated schedules of classes and enrollment figures to caregivers and their partners who issue training including certification and continuing education.

However, maintaining accurate data was a challenge for the organization. *"We're a team of six, and we all operated using separate systems,"* says Kim Suther, manager of SEIU 775 Benefits Group logistics and scheduling team. *"In addition, the instructors reporting to me use different systems for attendance reporting. It was difficult to reconcile everything."*

As a result, SEIU 775 Benefits Group created numerous workarounds involving manual processes to update schedules and attendance. *"Tasks that used to take 15 minutes were taking hours to complete as our programs grew,"* says McMaster. For example, updating class schedules involved manually building a calendar and printing one out for each instructor in each of dozens of locations. *"I carried binders around with the calendars, which was not efficient,"* McMaster says.

Customer:

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Solutions

Some SEIU 775 Benefits Group employees had already used Smartsheet and encouraged the training team to use the solution to overcome its challenges. *"I had been obsessed with Smartsheet just long enough to understand some of its functionality and capabilities,"* says McMaster. The organization started by using Smartsheet to display a list of classes, with each row representing a class session. The learning team then linked class data to a new sheet with updated enrollment data. In addition, SEIU 775 Benefits Group created Smartsheet workspaces for instructors and vendors to access. Each workspace displays dashboards that have updated classroom information and reports for attendance verification.

SEIU 775 Benefits Group uses Smartsheet to automatically send out reminders to instructors about needed actions or class schedule changes, such as cancellations or new instructors. The organization also uses Smartsheet Calendar App to view real-time class schedules and internal project information. Additionally, SEIU 775 Benefits Group project management and communications departments rely on Smartsheet for project planning and tracking.

Stronger visibility and increased efficiency

SEIU 775 Benefits Group is using Smartsheet to streamline classroom and scheduling information, providing better visibility into training for caregivers and instructors. *"There used to be a lot of different places where our data existed, and it wasn't clear how things were linked,"* says McMaster. *"It took a lot of digging around and knowledge of how things worked. Smartsheet presents all the data in one place, and it's all related and easy to see."* Using Smartsheet Calendar App, SEIU 775 Benefits Group has updated digital calendar information. This provides more shared visibility between instructors and scheduling departments.

The organization has increased its efficiency. Smartsheet's automation capabilities reduced previously manual work. *"I want to get as much done with as little effort as possible, and the automation in Smartsheet makes that happen,"* says McMaster. *"With Smartsheet, we can spend our time being more productive. That aligns with our organization's work of creating impact, not work, and helping caregivers do their jobs better."*

In a Nutshell:

The organization sends attendance data from Smartsheet into a data store and matches the information with student training requirements.

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Better training for caregivers

By being more efficient and productive, SEIU 775 Benefits Group can ensure that caregivers, instructors, and the wider partner network have the training and learning resources they need. *“Smartsheet has helped us be more efficient internally, but it’s also helping us get better information to our partners,”* says Purdy. For example, the organization sends attendance data from Smartsheet into a data store and matches the information with student training requirements. *“This means the training records are more accurate, so caregivers know exactly how much training they have left for their certifications,”* says Suther. *“The caregivers we serve are helping the most vulnerable people in our society, and it’s one of our goals to help them be trained in the most meticulous way to do their jobs.”*

Flexibility to adapt to online training

Smartsheet has also given SEIU 775 Benefits Group the flexibility to pivot to more virtual learning and training throughout the pandemic. *“We had to navigate a shutdown, and then begin offering online training, which was very complicated,”* says Katherine Smith, learning operations director for SEIU 775 Benefits Group. *“Not only did we have to restart classes, but we also had to spend a lot of time developing our curriculum in a different way for online learning. Smartsheet organized everything for us and allowed us to function during a very unpredictable time period.”*

SEIU 775 Benefits Group is now expanding its use of Smartsheet across its learning, training, and attendance program teams. *“We’re continuing to build in the whole scheduling system to include the classroom process and accounting for learners all the way through attendance verification,”* says Suther. *“Smartsheet has proven to be a very flexible tool for us, and we’ll keep finding new ways to make it even better for our teams.”*

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