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# An Agile Approach to Delivering HR Reporting and Analysis Capability

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# Agenda

- Defining The HR Problem
- Project Delivery Approach
- Agile Scrum: What's it about?
- Business Benefits
- Lessons and Next Steps

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# Defining The HR Problem

# The Scenario

## Iterative development of DWBI capability

- Government reporting DW
- DWBI roadmap focussed on CSU systems
- Subject areas focussed on student data
  - Admissions
  - UAC
  - Enrolments
  - At Risk

# The Scenario

## Next step HR – why?

- Strong business need
- Strong technical need
- Next project!

# Business Need

- Staff are our greatest asset, and greatest cost
- Information for analysis and monitoring critical processes

## BUT

- Data locked in source system
- Single HR SME to provide manual reporting
- HEIMS data not suitable for internal use

# Technical Need

- Existing data warehouse building up subject areas

**BUT**

- Trusted staff, position and org structure data not available for reuse in other subject areas
  - E.g. research

# Engaging Altis

## Called Altis...

- Already partnered on previous projects

## Project constraints: time and funding

- CSU restructure, no team capacity
- Therefore Altis working remotely, no blended team

## Four day scoping exercise

- Estimates/project plan



# Project Definition

## 1. Workforce analytics

- How many women do we have in senior positions?
- What percentage of our staff will retire in the next five years?
- What is the distribution of FTE across our faculties and schools?
- What is the ratio of professional to academic staff?
- Etc...

# Project Definition

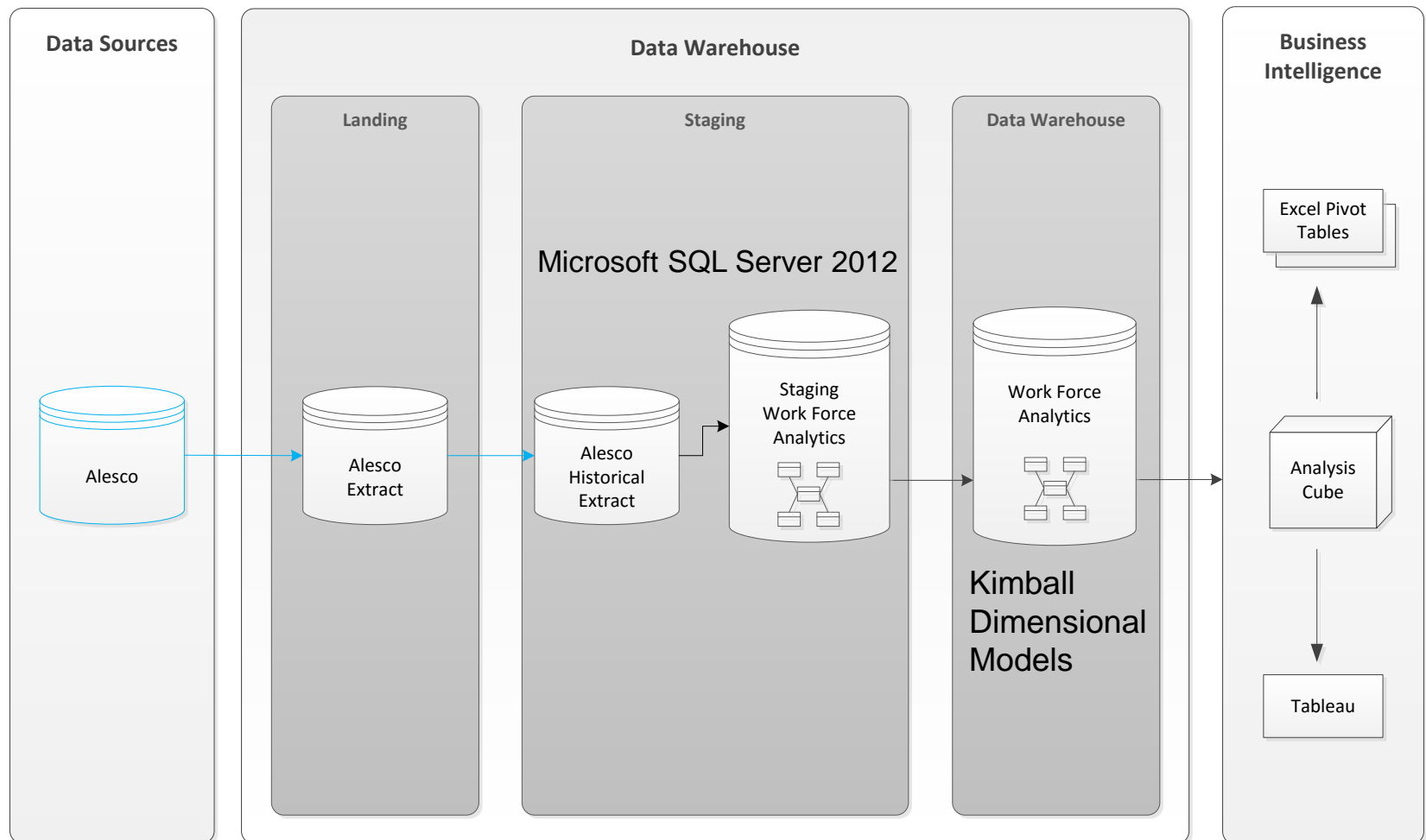
## 2. Staff recruitment

- How can we make the recruitment more efficient?
  - How long are we taking to hire?
  - Where are we spending the most time?
  - How successful is the process?
  - What are the best recruitment channels?
- Who are we hiring?
  - What are their demographics?
  - What are we hiring them for?
- What organisation units have the highest churn?

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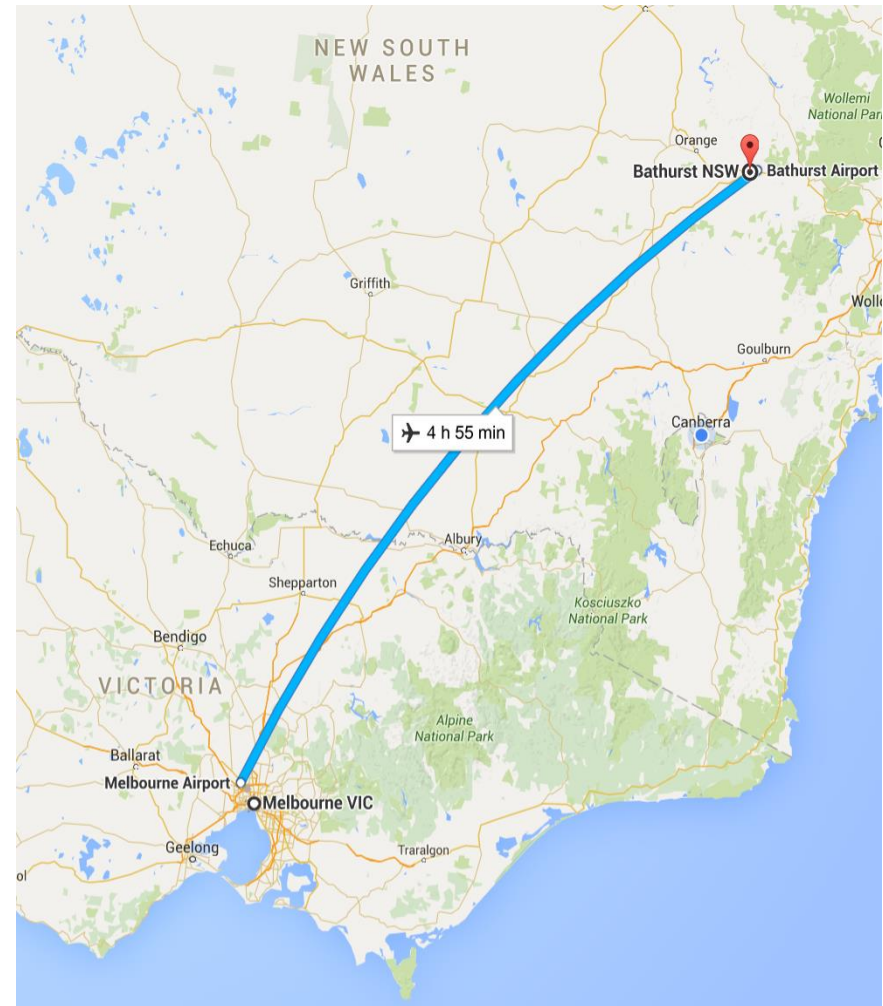
# Project Delivery Approach

# High Level Architecture



# Team Structure

- **Altis Team (Melbourne)**
  - Project Lead
  - Developer
- **CSU (Bathurst)**
  - Project Owner
  - Technical Resource



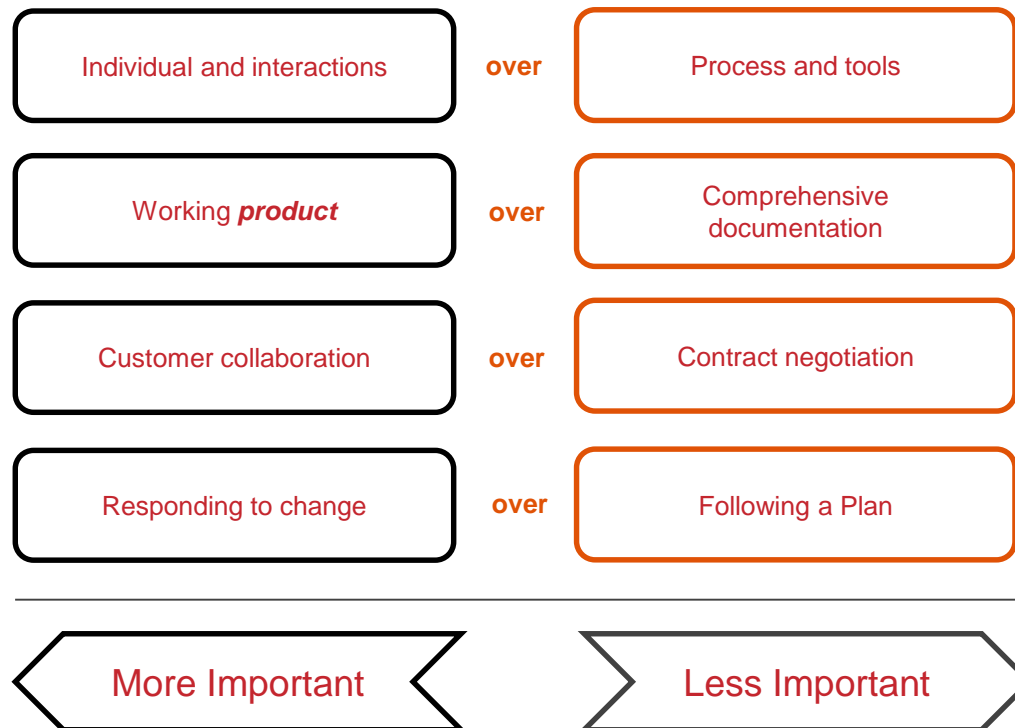
# Adoption Methods For A Remote Team



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# Agile Scrum: What's it about?

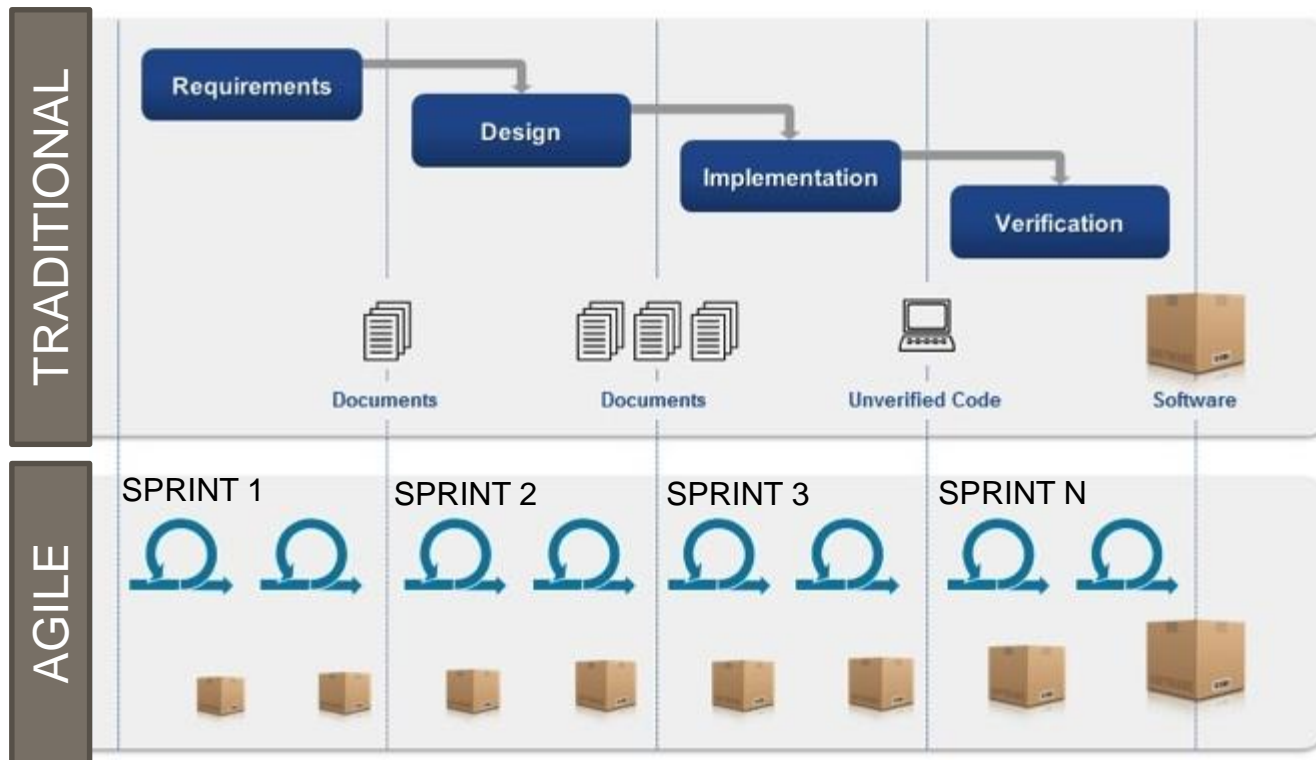
# The Agile Philosophy



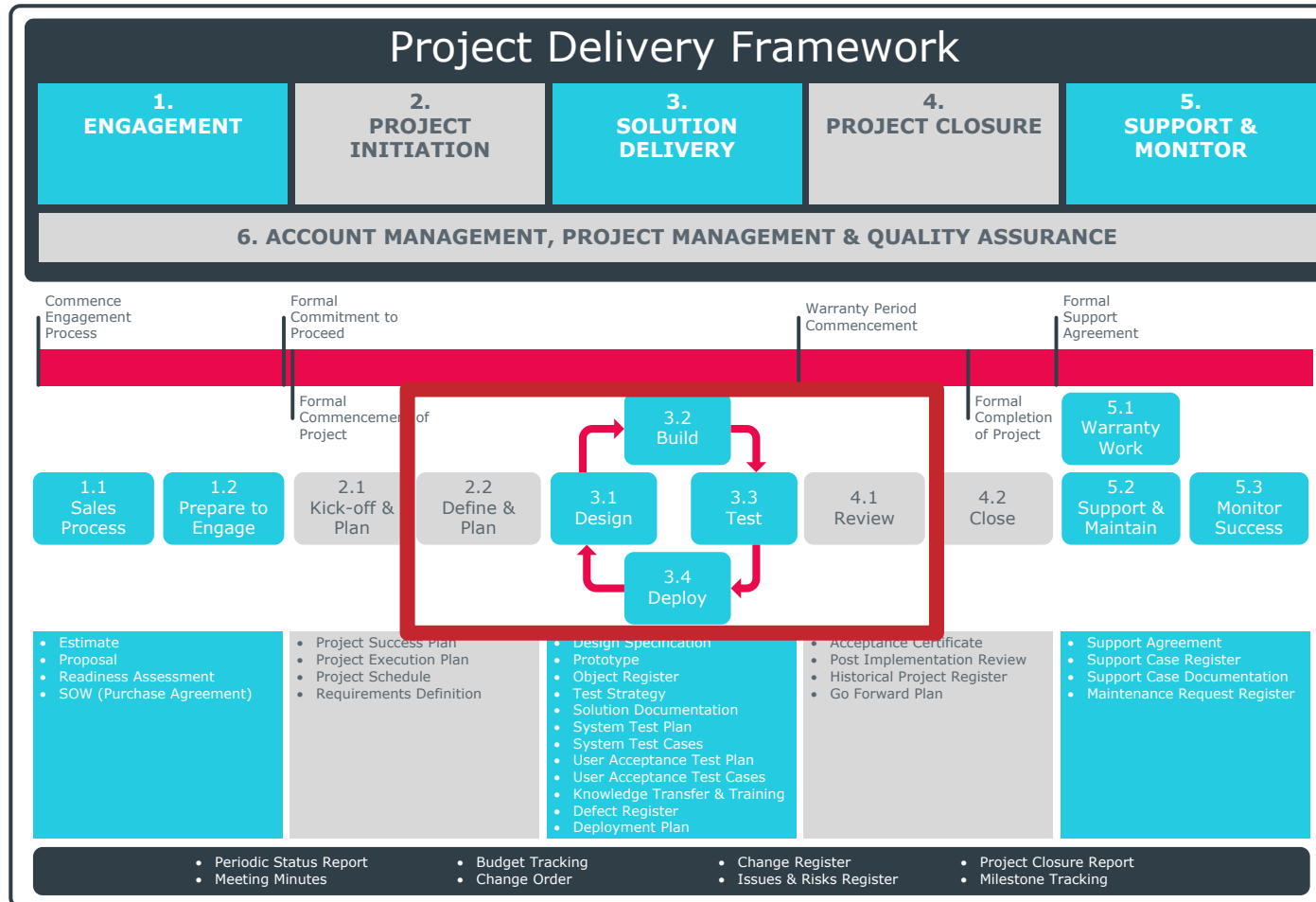
Source: [www.agilemanifesto.org](http://www.agilemanifesto.org)



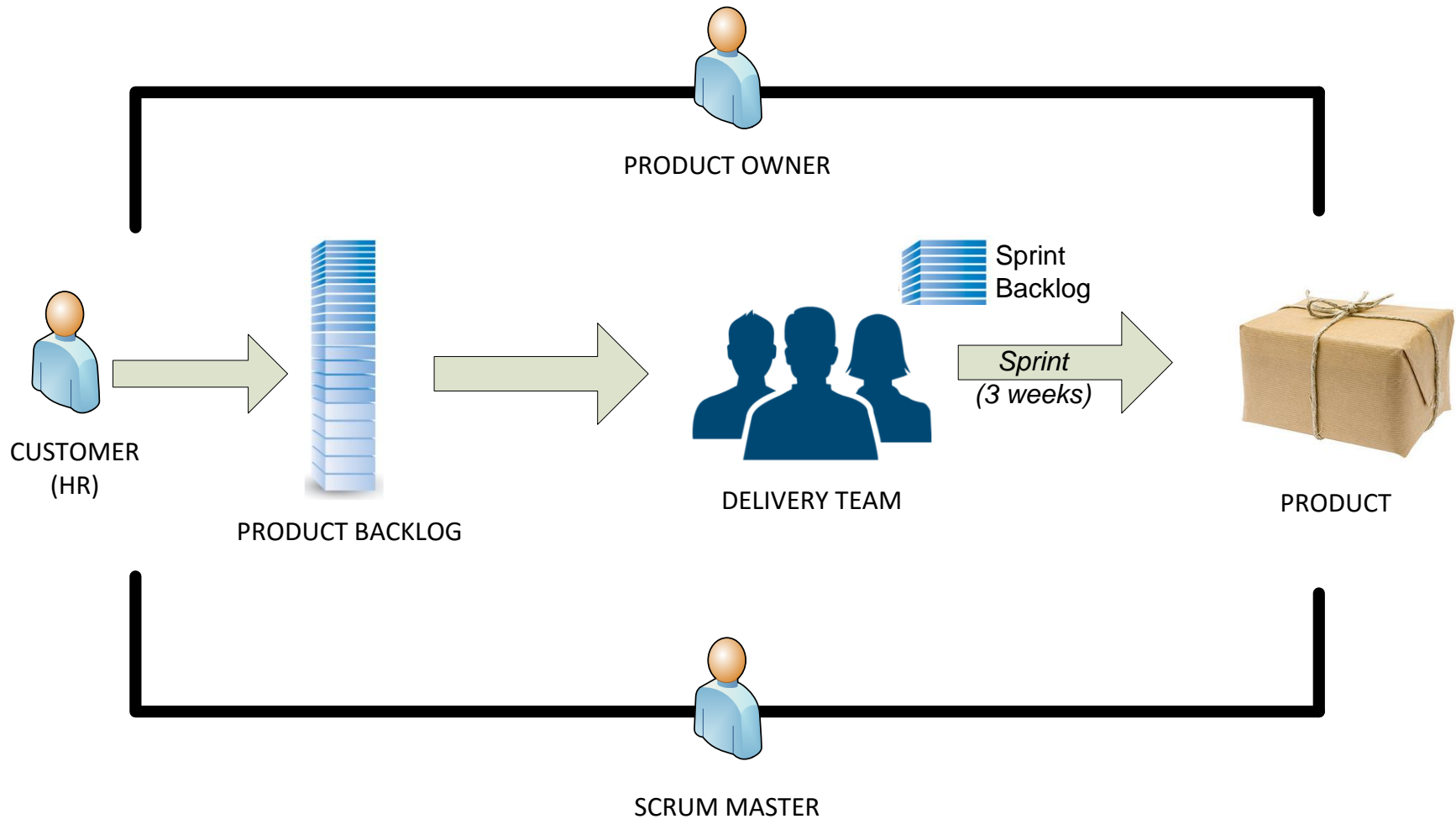
# Where does it fit in?



# How Did We Adopt This Approach?



# Core Components of Agile Scrum



# Sprint Planning

- **Set Sprint Goals**
  - What do we want to achieve?
- **Estimate Story Points (relative task sizing)**
  - Used the Fibonacci sequence

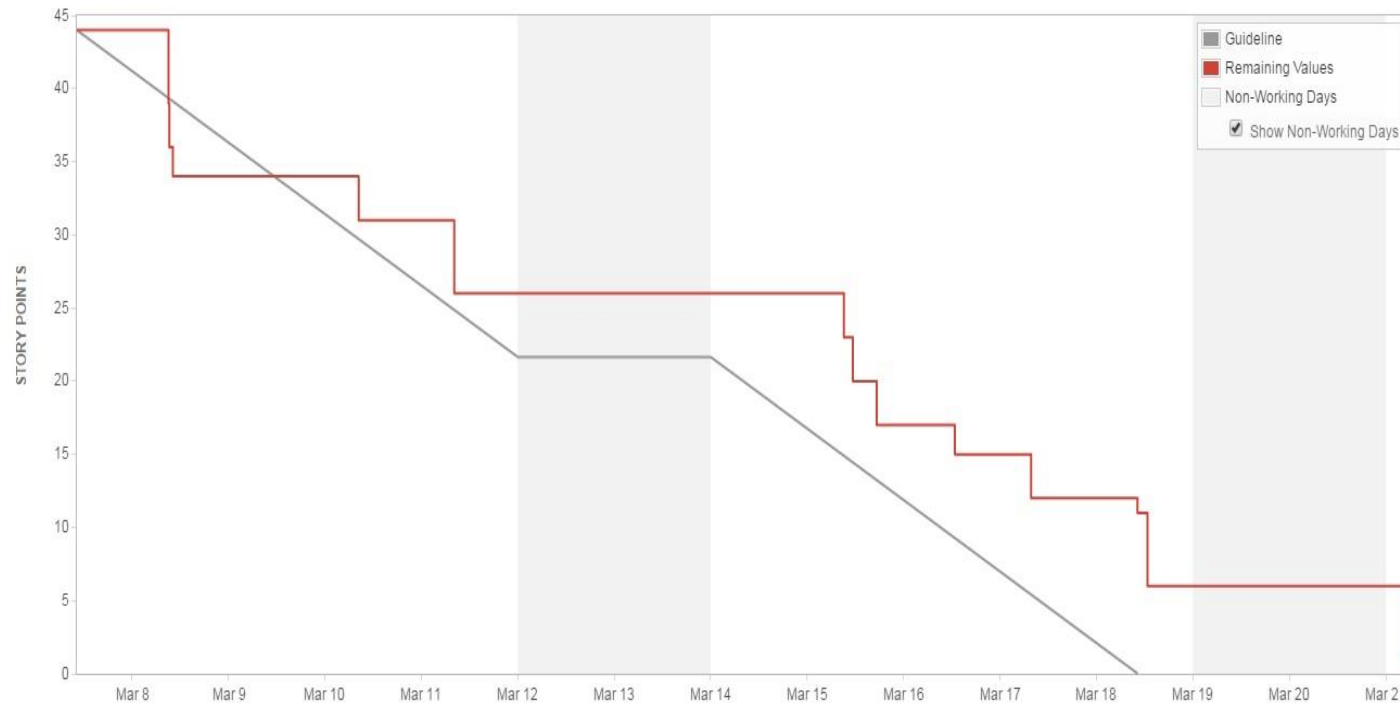
1 2 3 5 8 13 21 ...

E.g. Requirements Workshop = 3 points & Data Model = 8 points

- **Target a Velocity**

# Monitoring Your Progress

## - Daily Stand-Ups and Burndown Charts



# Learning From Each Iteration

- **Retrospectives**
  - What went well?
  - What could we have improved?
  - Take lessons learnt into the next sprint
  
- **Promotes:**
  - Continuous improvement
  - Transparency/honesty
  - Accountability

## In Summary...

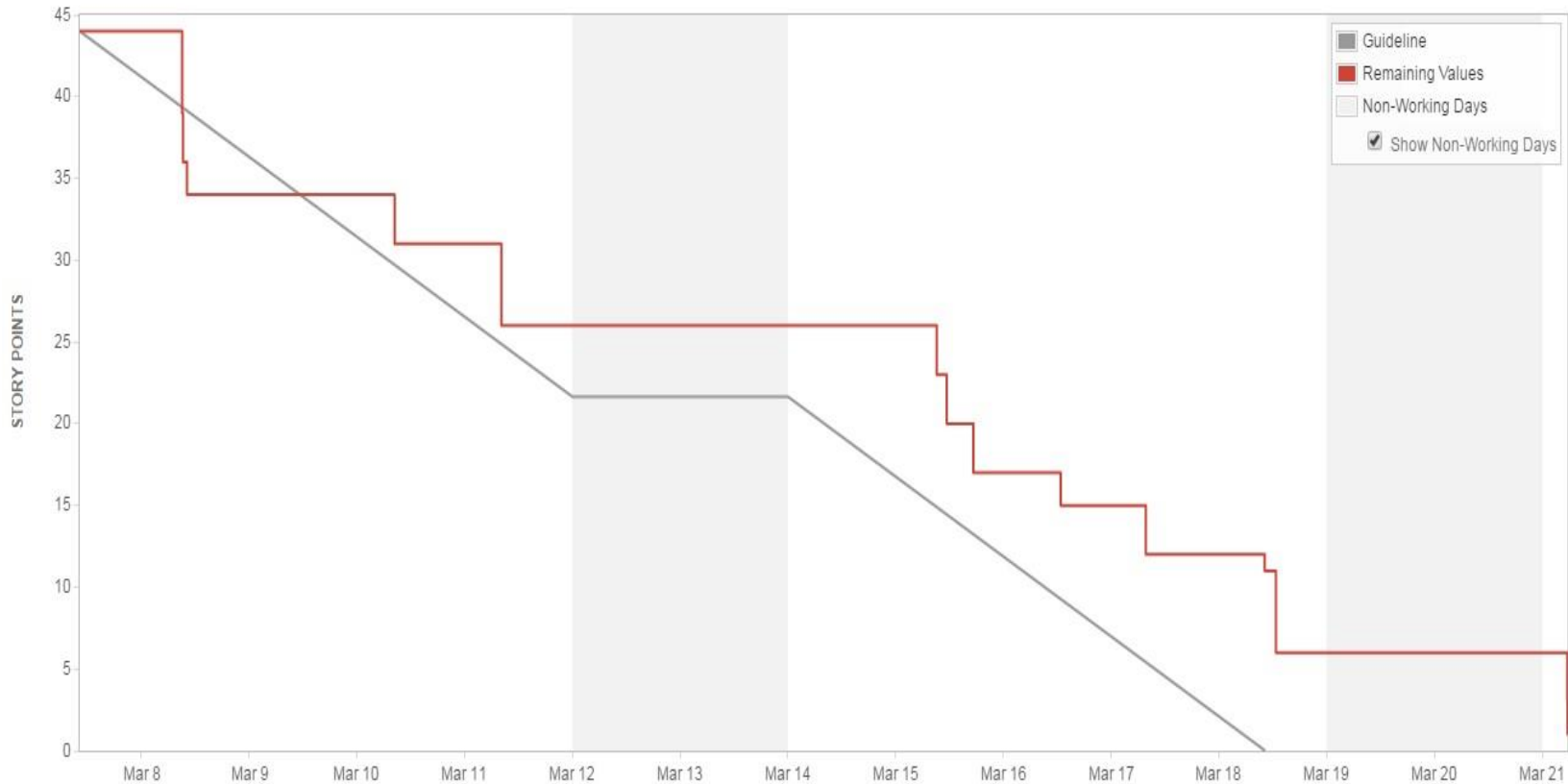
- Roles and responsibilities
- Prioritise your work!
- Plan your delivery
- Making sure there are no surprises
- Learn from your delivery and start all over again!

# A Client View of Agile

- Am I getting what I want?
  - Customer collaboration
  - Sprint planning
  - Retrospective
- Will it happen on time?
  - Daily stand ups
- How are we tracking against budget?
  - Burndown chart



# The Burndown Chart



# The Task Board

DWHR board

🕒 0 days remaining Complete Sprint























Board ▾



## CSU - HR Enhancements

QUICK FILTERS: Only My Issues Recently Updated

To Do      In Progress      QA / Peer Review      Done

|   |  |  |   |
|---|--|--|---|
| <p> DWHR-89<br/>↑ HR Reporting Requirements Discovery</p> <p></p> <p><input type="radio"/></p>         | <p> DWHR-95<br/>↑ Staff Profile &lt;Title&gt; Report Design</p> <p></p> <p><input type="radio"/></p> | <p> DWHR-149<br/>↑ Staff Profile Enhancement - Additional Metrics:</p> <p></p> <p><input type="radio"/></p>  | <p> DWHR-152<br/>↑ Recruitment - Position Data Enhancement</p> <p></p> <p><input type="radio"/></p> |
| <p> DWHR-96<br/>↑ Staff Profile &lt;Title&gt; Report Build</p> <p></p> <p><input type="radio"/></p>    | <p> DWHR-153<br/>↑ Staff Profile Enhancement - Additional</p> <p></p> <p><input type="radio"/></p>   | <p> DWHR-90<br/>↑ Requirements and Analysis related tasks / stories</p> <p></p> <p><input type="radio"/></p> | <p> DWHR-150<br/>↑ Staff Profile Enhancement - Additional</p> <p></p> <p><input type="radio"/></p>  |
| <p> DWHR-151<br/>↑ 3 Tier Cube Security for Staff Profile</p> <p></p> <p><input type="radio"/></p> | <p> <b>Alok</b></p> <p> <b>Sam</b></p>   |  | <p> DWHR-147<br/>↑ Recruitment Excel Templates</p> <p></p> <p><input type="radio"/> 1</p>       |

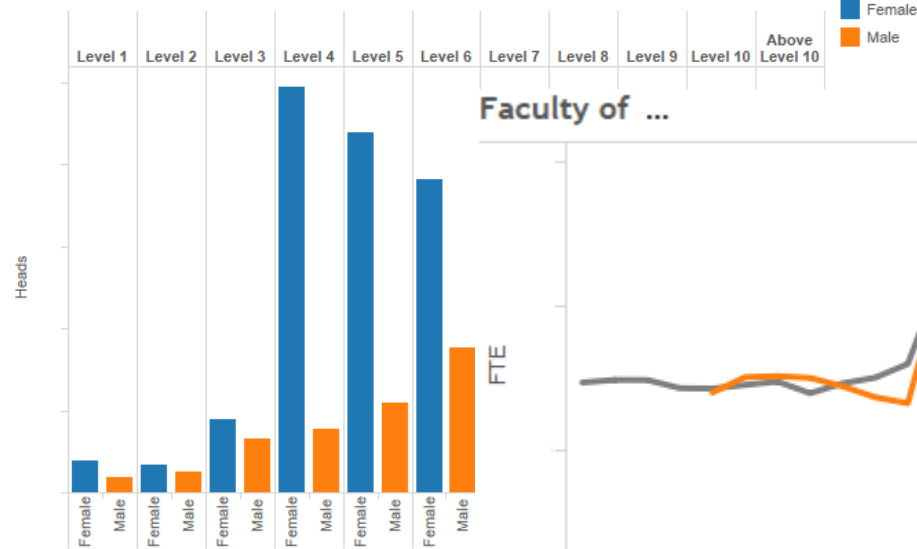
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## Business Benefits

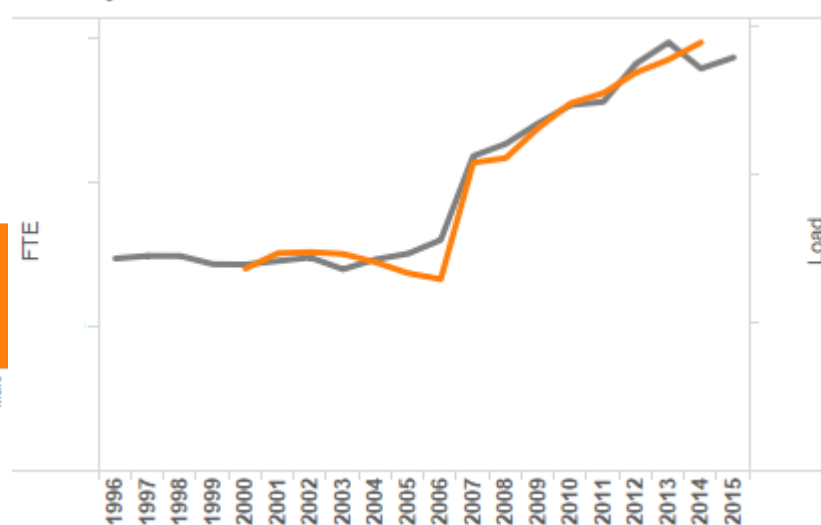
# Business Benefits

- Workforce analytics available for anyone, anytime, anywhere

Non-Academic Level by Gender



Faculty of ...



|   | A                          | B           | C |
|---|----------------------------|-------------|---|
| 1 | Primary Occupancy Flag     | Primary     |   |
| 2 | Active Occupancy Flag      | Active      |   |
| 3 | Latest Snapshot Flag       | Latest      |   |
| 4 | Snapshot Date.Calendar     | All         |   |
| 5 | Snapshot Type Desc         | Monthly     |   |
| 6 | Adjunct Occupancy Flag     | Non-Adjunct |   |
| 7 | Occupancy Appointment Flag | Appointment |   |

|  | Actual FTE | Occupancy Count |
|--|------------|-----------------|
|  | 0.11       | 0.11            |
|  | 0.10       | 0.10            |
|  | 0.45       | 0.45            |
|  | 1.20       | 1.20            |
|  | 3.00       | 3.00            |
|  | 1.45       | 1.45            |
|  | 0.30       | 0.30            |
|  | 1.10       | 1.10            |
|  | 3.00       | 3.00            |
|  | 1.00       | 1.00            |
|  | 1.00       | 1.00            |
|  | 0.10       | 0.10            |
|  | 4.20       | 4.20            |
|  | 1.40       | 1.40            |
|  | 1.99       | 1.99            |
|  | 1.10       | 1.10            |
|  | 1.00       | 1.00            |


# Business Benefits

- New and improved staff recruitment lifecycle
- Capability to manage and monitor recruitment
  - Monitor process, identify actions
  - Analyse and optimise processes
  - Analyse recruitment channel, focus advertising
- New Workforce Planning Analyst position

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# Lessons Learnt and Next Steps

# The Challenge

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- Recurrent work: submission, load planning, surveys, reports, analysis
  - Projects: new subject areas
  - Training and engagement: workshops, community of practice
  - Information requests: media office, Execs, VC, Fols

# Its all about dates...

| Mon   | Tue   | Wed  | Thu   | Fri  | Sat   | Sun   |
|---|---|--|---|--|---|---|
| 30<br><ul style="list-style-type: none"> <li>CSU Direct: Late Application: S2-201660</li> <li>GOS: Online data collection ends</li> </ul> | 31<br><ul style="list-style-type: none"> <li>2016 Student submission</li> <li>AUDIF: Reports available: 1H</li> <li>PSG #3: Meeting</li> <li>Revisions</li> <li>Revisions submissions</li> <li>SEC #9: Meeting</li> <li>Student 1Q</li> </ul> | 1<br><ul style="list-style-type: none"> <li>Chancellor's Foresighting Committee #1: Agenda closes</li> <li>SEC #10: Agenda closes</li> <li>UCPC #3: Meeting</li> </ul>   | 2<br><ul style="list-style-type: none"> <li>Council #3: Agenda closes</li> <li>UAC: June Round 1: Institution Doc Close</li> <li>Vice-Chancellor's Report to Council #3: Agenda closes</li> </ul>     | 3  | 4   | 5<br><ul style="list-style-type: none"> <li>UAC: June Round 1: Change Preferences Close</li> </ul>  |
| 6<br><ul style="list-style-type: none"> <li>SES: Final day for additional populations</li> </ul>  | 7   | 8<br><ul style="list-style-type: none"> <li>UAC: June Round 1: Offers Released</li> </ul>  | 9   | 10<br><ul style="list-style-type: none"> <li>Session 45: Census</li> <li>VTAC: Applications Close: 201660</li> <li>VTAC: Change Preference Close: 201660</li> <li>VTAC: SEAS Applications Close: 201660</li> </ul> | 11  | 12  |
| 13<br><ul style="list-style-type: none"> <li>Holiday: Queen's Birthday</li> <li>UAC: June Round 2: Applications Close</li> </ul>          | 14<br><ul style="list-style-type: none"> <li>SEC #10: Meeting</li> </ul>  | 15<br><ul style="list-style-type: none"> <li>2016 Commonwealth Scholarship submission</li> <li>Chancellor's Foresighting Committee #1: Meeting</li> <li>Commonwealth Scholarship: Offers 2H</li> <li>SEC #11: Agenda closes</li> </ul> | 16<br><ul style="list-style-type: none"> <li>Council #3: Meeting</li> <li>UAC: June Round 2: Institution Doc Close</li> <li>Vice-Chancellor's Report to Council #3: Meeting</li> </ul>                | 17<br><ul style="list-style-type: none"> <li>Session 30: Ends</li> </ul>   | 18  | 19<br><ul style="list-style-type: none"> <li>UAC: June Round 2: Change Preferences Close</li> </ul> |
| 20<br><ul style="list-style-type: none"> <li>SES: Sample file sent to institutions</li> </ul>   | 21  | 22<br><ul style="list-style-type: none"> <li>UAC: June Round 2: Offers Released</li> </ul>   | 23<br><ul style="list-style-type: none"> <li>UAC: June Round 3: Institution Doc Close</li> </ul>  | 24<br><ul style="list-style-type: none"> <li>UAC: June Round 3: Applications Close</li> <li>VTAC: Round 1 Offers: 201660</li> </ul>  | 25<br><ul style="list-style-type: none"> <li>VIC - School Holidays: Winter</li> </ul> | 26<br><ul style="list-style-type: none"> <li>UAC: June Round 3: Change Preferences Close</li> </ul> |
| 27<br><ul style="list-style-type: none"> <li>VIC - School Holidays: Winter</li> </ul>   | 28<br><ul style="list-style-type: none"> <li>SEC #11: Meeting</li> </ul>  | 29<br><ul style="list-style-type: none"> <li>SEC #12: Agenda closes</li> <li>UAC: June Round 3: Offers Released</li> </ul>   | 30<br><ul style="list-style-type: none"> <li>2016 Staff submissions</li> <li>CSU Direct: Extended Application: S2-201660</li> <li>Staff: Actual Casual FY</li> <li>Staff: Estimated Casual</li> </ul> | 1<br><ul style="list-style-type: none"> <li>SES: Final day for additional questions</li> </ul>   | 2   | 3   |



# Adapting Agile

## The Framework

- Four week cycles
- Define recurrent work as a backlog
- Cycles + Backlog = Capacity plan
- Identify opportunities for projects
- Buffer for Information requests

# Adapting Agile

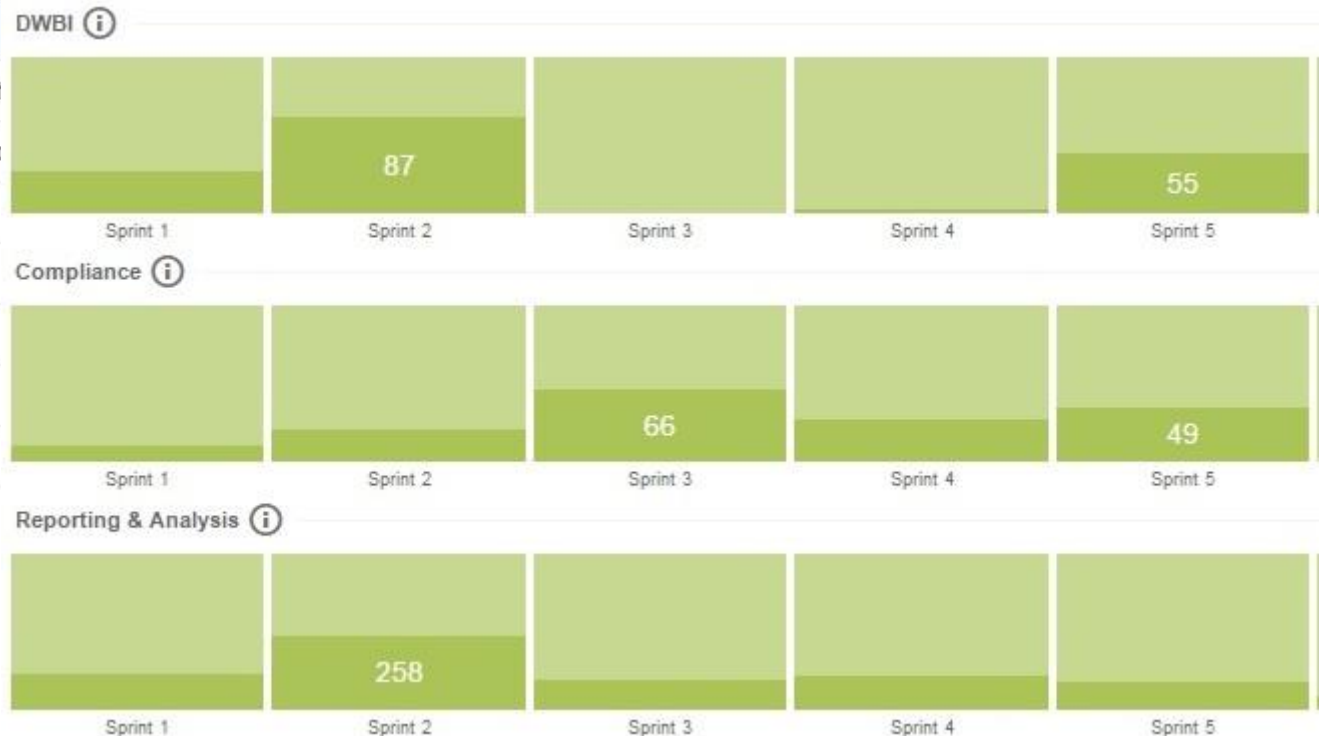
## The Practice

- Start with planning session
- Deliver
  - Recurrent work
  - Projects
  - Training
  - Information requests
- End with a retrospective

# Planning Releases

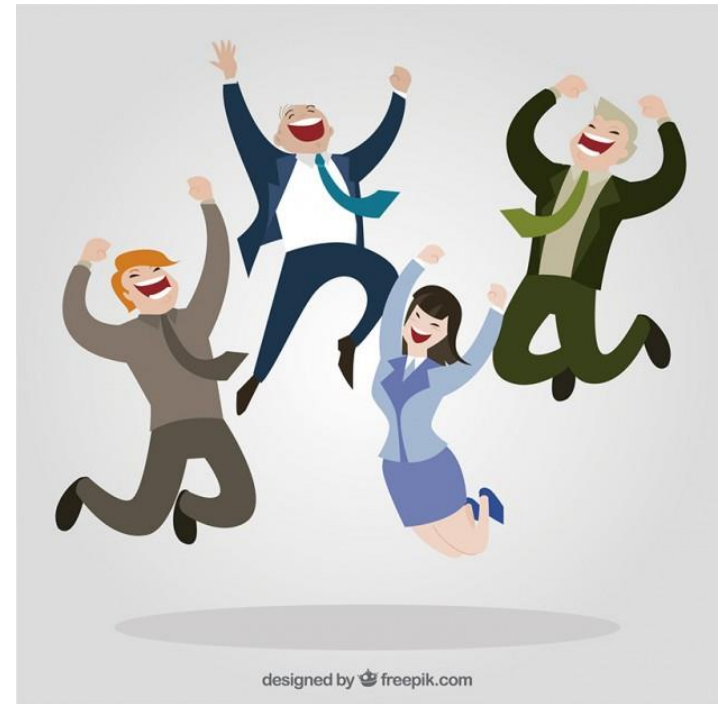


| #  | Title                           | Release |
|----|---------------------------------|---------|
| 32 | > Develop PG CGS model sheet    | 3       |
| 33 | > 2H AUIDF Report               | 3       |
| 34 | > 2Q2016 Submission             |         |
| 35 | > 201660 Commencing Scholarsh   |         |
| 36 | > 20161H Continuing Scholarship |         |
| 37 | > CAL update                    |         |
| 38 | > What's New August             |         |
| 39 | > Admissions Updates            |         |
| 40 | > Manage PG CGS quota           |         |
| 41 | > 1H2016 Verification           |         |



## In Summary

- Started with an idea for a project
- Scoped and delivered two HR subject areas
  - Workforce Analytics
  - Staff Recruitment
- Took lessons from Agile and applied them to managing a planning team





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Q & A



Presented By:  
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