



FROM ONE CASUAL SYSTEM TO ANOTHER. HOW THE UNIVERSITY OF ADELAIDE MANAGED THE CHANGE

SESSION 6076
7 November 2018

ADU 7-9 NOVEMBER 2018

PRESENTERS

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THE UNIVERSITY OF ADELAIDE

Established: 1874

Campuses: 4

Faculties: 5

Divisions: 3

Students: 22,000

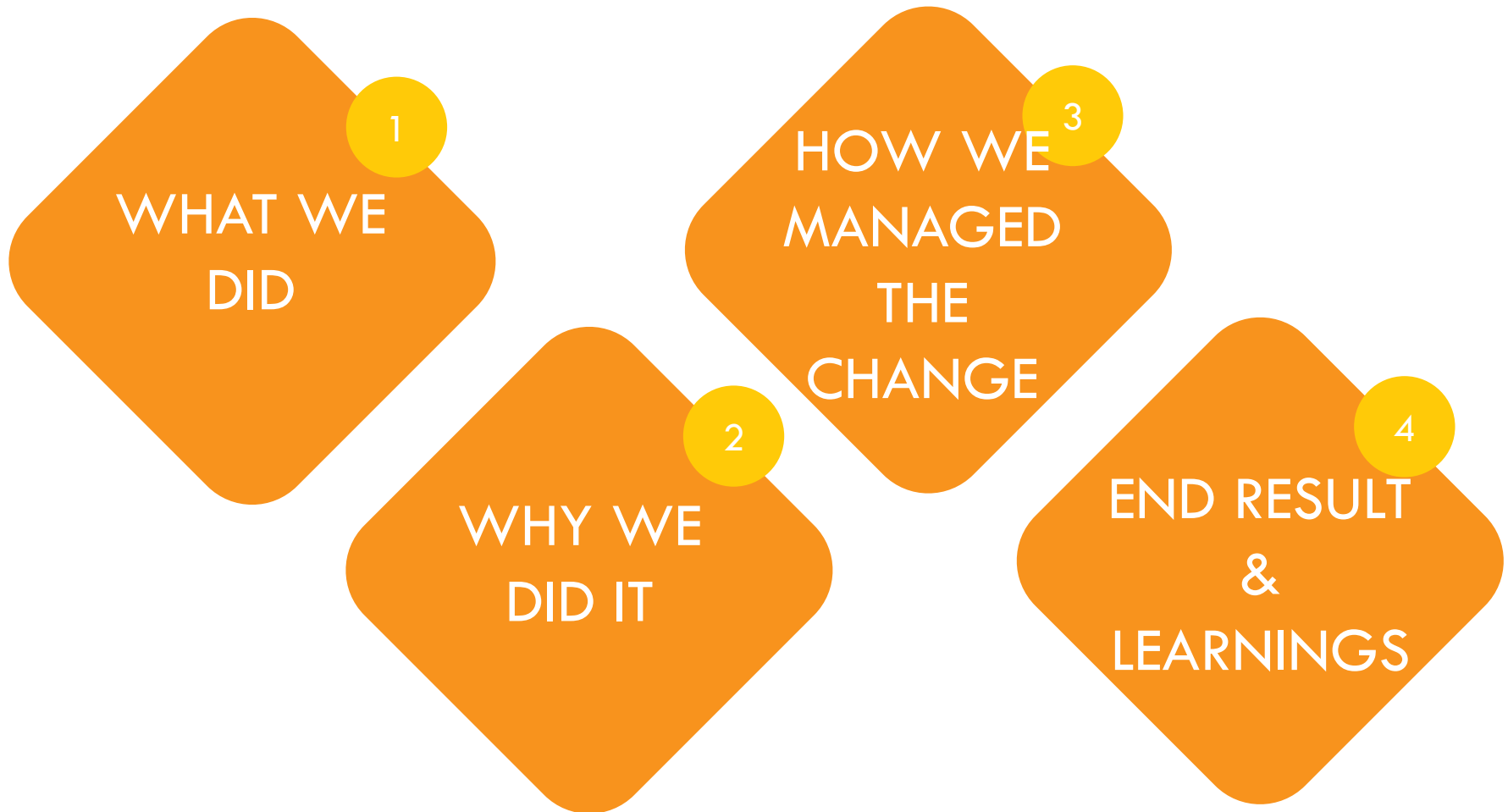
Staff: 3,500 (excl casuals)



ORGANISATION & ORACLE

HCM, Campus & Finance
PeopleSoft HCM 9.2
PeopleTools 8.55, PUM #27
GP, Time & Labour, Profile
Mgmt, Partial Position Mgmt,
Contract Admin, Training
Admin

OVERVIEW



WHAT WE DID

Casual System
Replacement

WHAT WE DID

CASPA

- PeopleSoft Time & Labour
- Oracle Fusion Middleware (OFM)
- Unified



CAPS

- 100% PeopleSoft:
- SSO Forms
 - Activity Guides
 - Time & Labour

WHAT WE DID

23rd June
2018

- Engagement initiation
- Approval
- Acceptance
- Onboarding

21st July
2018

- Timesheets
- Planned vs Actual reporting

PROJECT SCOPE — CONTRACTS 2017

8528 Contract Creation

4856 Budget Approval

8528 Contract Approval

459 Visa Checks

8528 Contract Acceptance

30,899*

*Excludes Amendments, resubmissions/rework

PROJECT SCOPE — TIMESHEETS (SEPTEMBER 17)

4214 Submission/Review

4214 Validation

638 Escalations/Pushback

9066 Total for September

Annual

108,792

WHY WE DID IT

SHORT DESCRIPTION

WHY WE DID IT



Project to replace CASPA in order to achieve:

- Improved performance/system stability
- Improved support – experience within university
- Reduced maintenance costs due to:
 - reduction in support staff
 - reduced licensing fees
- Continuous Improvement – setting us up for the future. Enabling easier improvement opportunities through regular system updates.

BENEFITS

- 1 stop shop, everything accessible through SSO
- All pay related activities are now in one system
- Overall improved user experience
- Consistent and streamlined casual management processes across the University



BENEFITS

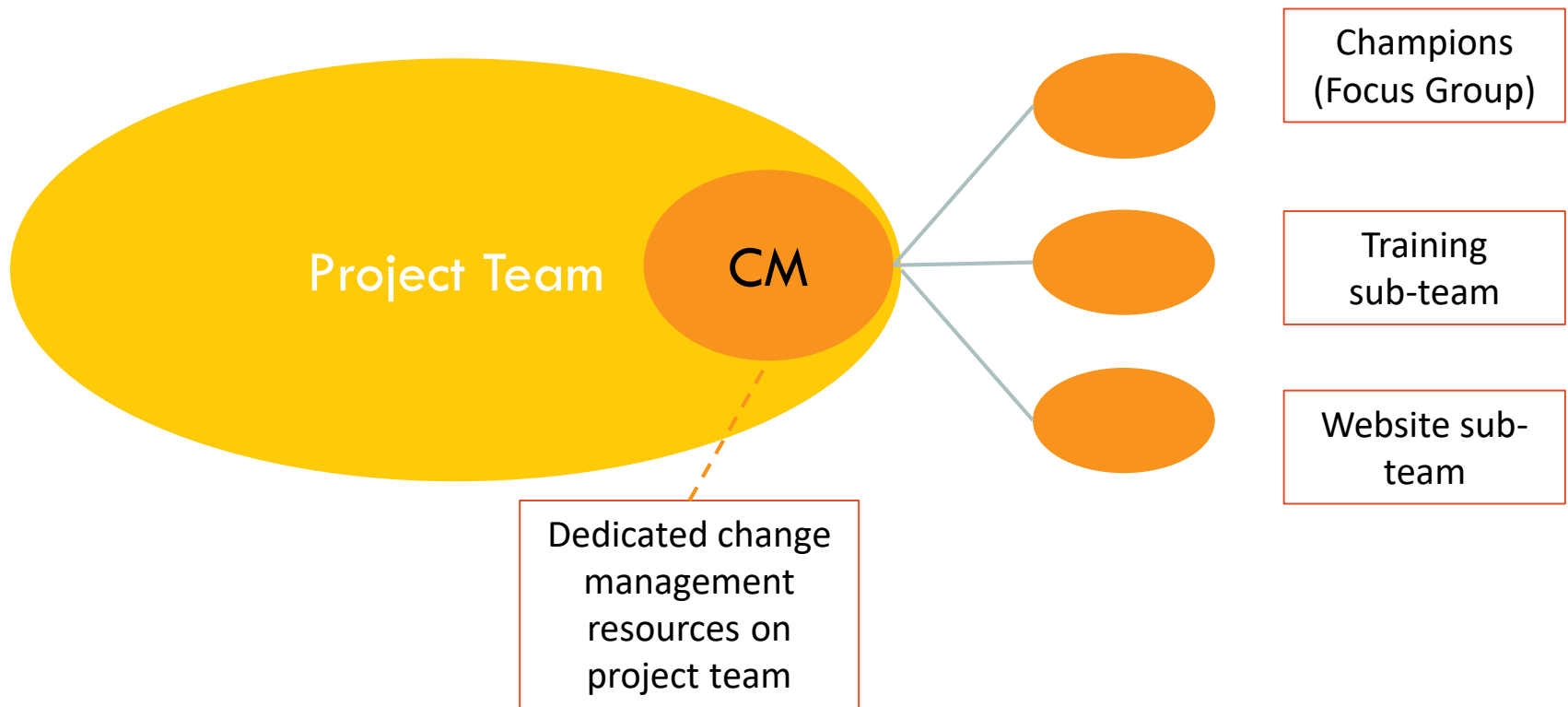
- Improved mobile and browser compatibility
- Obtaining additional information through Casual Onboarding task (Qualifications, VISA, citizenship)
- Greater visibility of where casual engagement and timesheet tasks are
- Casuals can easily see the status of their timesheets



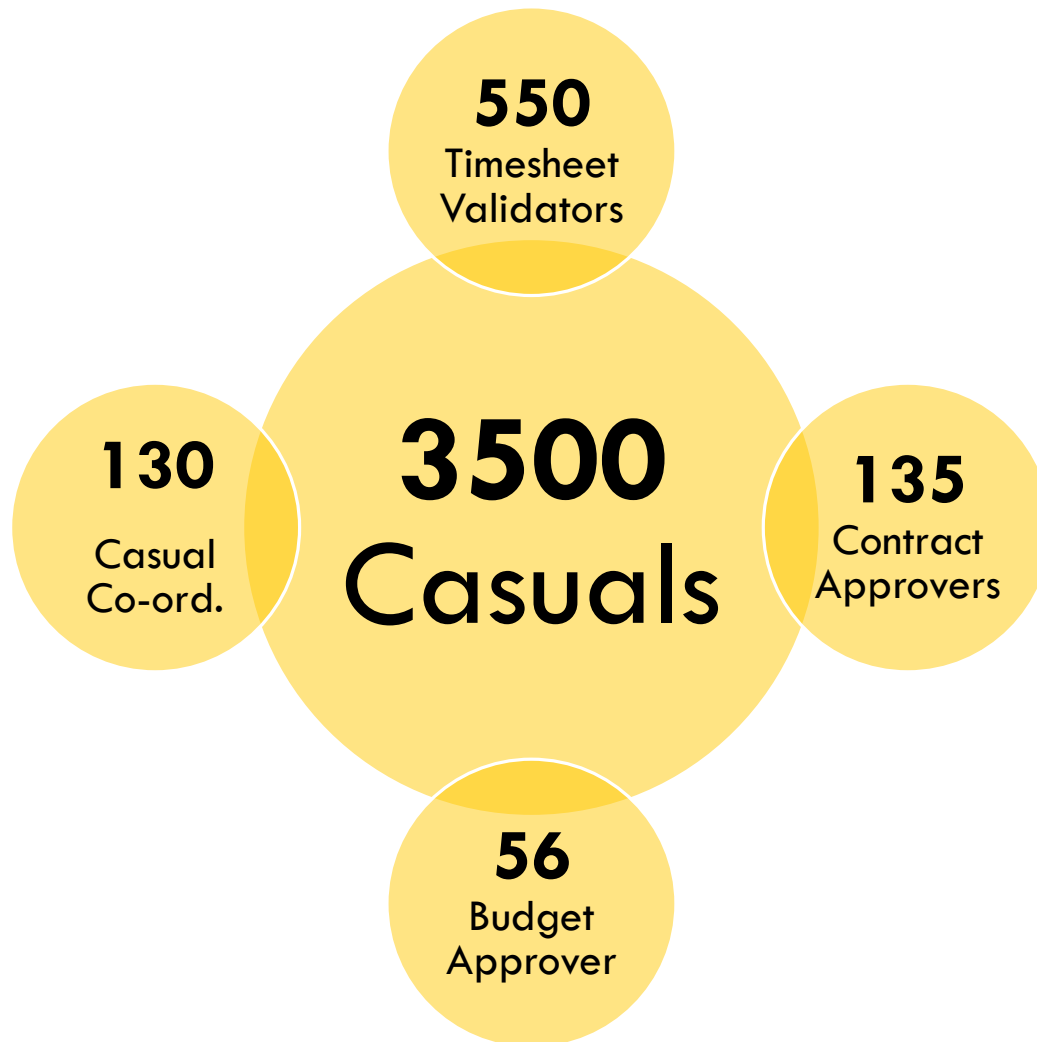
HOW WE MANAGED THE CHANGE

How did we manage the
change from one casual
system to another

TEAM STRUCTURE



IDENTIFY USERS/STAKEHOLDERS



CHANGE IMPACT ASSESSMENT

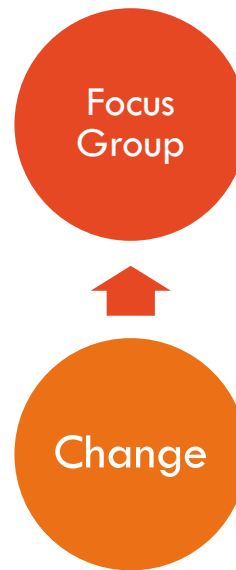
- Change Impact Assessment Register
- 57 items on the register detailing as is and to be process, who is impacted, benefits/dis benefits.

| Epic | Function / Process Area | As Is Current process, current state | To Be Future process, future state | Details of Change Impact Description of changes between As-Is, To-Be | Casual Employee | Casual Supervisor | Casual Coordinator | Approver | Head of School | Recruitment and Appt | Isa Team | HR Service Centre | User List Coordinator | Payroll | HR SOS | Finance | Who is impacted? Roles impacted | Impact | Benefits Potential benefits to this new process or way of working e.g. cost savings through automation of manual work | Dis-Benefits | Business Change Plan (BCP) Proposed activities to manage the change impacts (incl. who owns it). Must be specific activities. |
|----------------------|-------------------------|--|---|--|-----------------|-------------------|--------------------|----------|----------------|----------------------|----------|-------------------|-----------------------|---------|--------|---------|------------------------------------|--------|--|---|---|
| 1. Casual Engagement | Amendment | Contract is amended through CASPA to extend end date of the offer | In CAPS II end date is extended a new offer is required | Action is required by the casual coordinator in both current and future state, to eliminate the need for new offers too often, the end date will need to be considered carefully | x | x | | | | | | | | | | | Casual Coordinator and Casual | Low | Removing the concept of continued contract amendments and delay with payments | 'Will need to create a new offer if date needs to be extended. This may increase the number of contracts if the date continues to change from original offer. | Discussed at Focus Group and summarised at end of 2017 to them. Need to include into training materials |
| 1. Casual Engagement | Amendment | Contract is amended due to increase in sessions or add different types of sessions | Sessions can be amended via a new interface, no need for contract to be amended or new offer to be made | Action is required by the casual coordinator in both current and future state, however the casual does not need to go through the contract acceptance process to ensure they are paid the sessions worked in addition to their original contract | x | x | | | | | | | | | | | Casual Coordinator and Casual | Low | Improved engagement with the casual and agility of making changes in the system | New way of working for casual coordinator, will require training. Stronger diligence required by the supervisor/timesheet validators approving timesheets to ensure it doesn't go way over budget - the Planned vs actual report will support with this | Discussed at Focus Group and input into training materials. Covered off in VCE Paper of the budget impacts and attended Finance Operations meeting to discuss. Need to emphasise impacts within casual coordinator training |
| 1. Casual | Amendment | Contract is amended to increase the | No amendment or new offer is required, | No need for contract amendments to | x | x | | | | | | | | | | | Casual Coordinator | Low | Improved engagement with the casual, assist to | Stronger diligence required by the | Discussed at Focus Group |

CHANGE IMPACT ASSESSMENT

- Only trained Casual Coordinators will have access to initiate an engagement
- **Removal of Budget Approver from workflow**
- Inability to select a specific Engagement Approver, everyone with the delegation (i.e. on the User List) will get the email and task
- Engagements unable to be amended except for Timesheet Validator, Supervisor, Academic Schedules
- On-boarding mandatory for new casuals before being paid
- **No Cap on Timesheets**
- One Timesheet Validator / Engagement
- **Administrators will not be able to enter timesheets on behalf of Casuals**
- **Academics will be submitting their own timesheets through SSO**

ENGAGEMENT



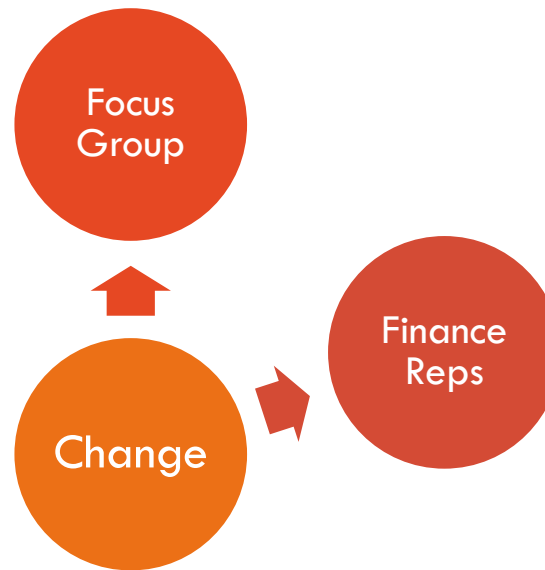
ENGAGEMENT

Focus Group

- Early 2017 invitation sent for representatives
- Monthly meetings
- Homework for group
- Help in decision making
- Local “Champions” – driver of communication
- Post implementation feedback session
- UAT



ENGAGEMENT



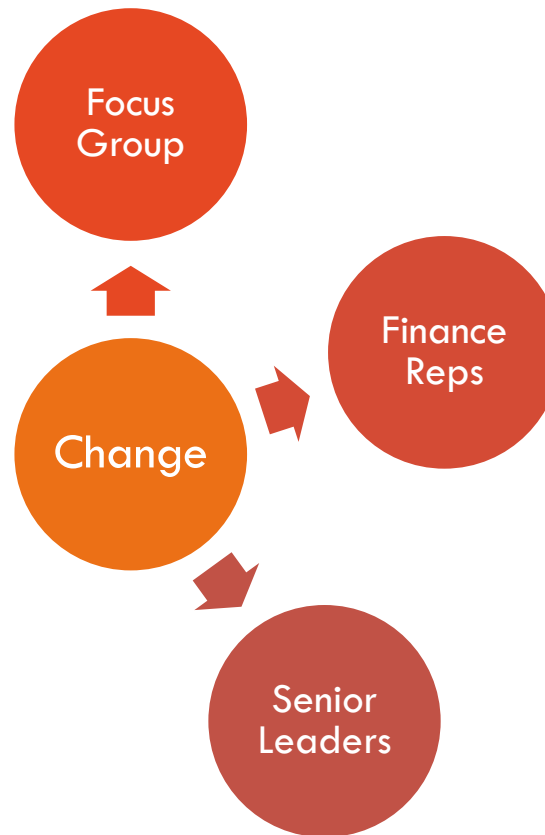
ENGAGEMENT

Finance Reps

- Discussed financial impacts
- Worked through business process change suggestions



ENGAGEMENT



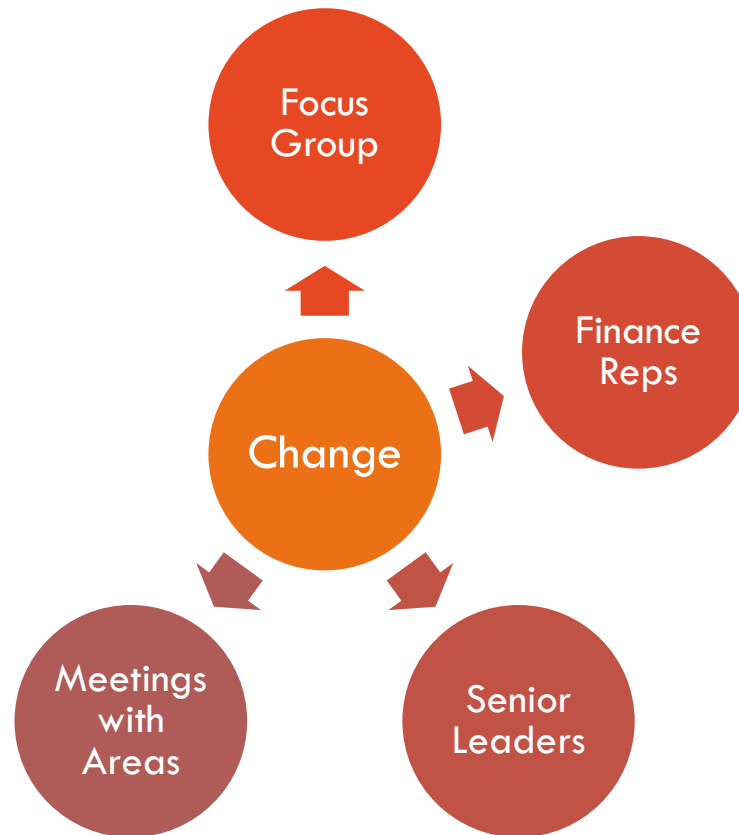
ENGAGEMENT

Senior Leaders

- Provide overview of project
- Discuss key impacts for the faculty
- Share change approach



ENGAGEMENT



ENGAGEMENT

Meetings with Areas

- Shared the changes with the biggest impact – how to reduce impact?
- Share change approach
- Help to identify where resistance may occur



TRACKING ENGAGEMENT

Tracked engagement with areas on a spreadsheet

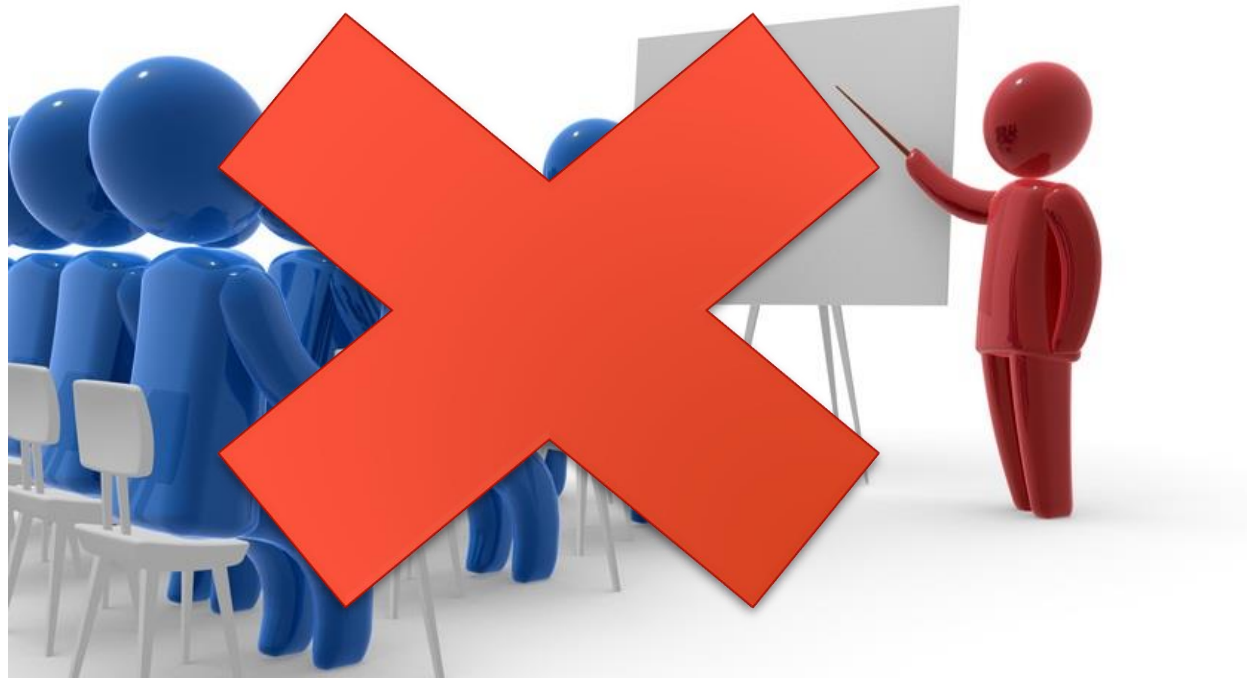
| Row Labels | Ad-hoc | Default | Professional | Grand Total | Comments | Focus Group Rep? | Meeting with Area? | Meeting with HOS/Exec? | Meeting with Finance group? |
|--------------|------------|------------|--------------|-------------|---|-------------------|--------------------|------------------------|-----------------------------|
| Divis | 505 | 59 | 784 | 1348 | | | | | |
| Of | | | 21 | 21 | Small numbers. Can be managed through comms. | n/r | n/r | Scheduled 17/5 | n/r |
| Pr | | | 8 | 8 | Small numbers. Can be managed through comms. | n/r | n/r | Scheduled 17/5 | n/r |
| Pr | 64 | | 68 | 132 | | | | Scheduled 17/5 | |
| Pr | 44 | 59 | 264 | 367 | | Yes - | Yes | Scheduled 17/5 | Yes |
| Sti | 38 | | 150 | 188 | | Yes - | Yes | Scheduled 17/5 | n/r |
| Sti | | | 70 | 70 | | | | Scheduled 17/5 | |
| Sti | 11 | | 52 | 63 | | | | Scheduled 17/5 | |
| Sti | | | 56 | 56 | | | | Scheduled 17/5 | |
| Ur | | | 67 | 67 | | | | Scheduled 17/5 | |
| Wi | 348 | | 28 | 376 | | | | Scheduled 17/5 | |
| Divis | 3 | | 39 | 42 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Ac | | | 3 | 3 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Ac | | | 3 | 3 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| En | | | 2 | 2 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| In: | | | 1 | 1 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| In: | 3 | | 4 | 7 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Re | | | 1 | 1 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Re | | | 23 | 23 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Ro | | | 1 | 1 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Ur | | | 1 | 1 | Small numbers. Can be managed through comms. | n/r | n/r | n/r | n/r |
| Exte | | | 27 | 27 | | | | | |
| SA | | | 27 | 27 | The CEO of SATAC is very new therefore was not in | Yes | Yes | n/r | Yes |
| Facu | 516 | 402 | 269 | 1187 | Meeting with area was re-scheduled until 17th April | Yes | Yes 17/4 | Yes 17/4 | Yes 17/4 |
| Ar | 1 | | 25 | 26 | Meeting with area was re-scheduled until 17th April | Yes | Yes 17/4 | Yes 17/4 | Yes 17/4 |
| Flac | 192 | 114 | 65 | 371 | Meeting with area was re-scheduled until 17th April | Yes - Maria Dinna | Yes 17/4 | Yes 17/4 | Yes 17/4 |

ENGAGEMENT



ENGAGEMENT

Training



ENGAGEMENT



Training

- Business Process workshop
- Roadshows across each campus
- Casual Coordinator Information Session
- Info sheet for ITDS Helpdesk
- Internal HR Training sessions
- Pop-up tutorial video for casuals and timesheet validators
- Drop-in go-live sessions for casual coordinators

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Training

- Website:
 - Quick Reference Guides (QRG)
 - Tutorial Videos
 - Help Guides
 - Checklists

[Demo](#)

- Casual Coordinator Online Training Module
 - Mandatory
 - Simulation for grading
 - QRG's, videos. help guides, Checklists

[Demo](#)

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Training

How did we know what training materials were needed?

Have you heard of Action Mapping??

ENGAGEMENT

Training

What do they need to do?

Why aren't they doing it? What's so hard?

What will help?

COMMUNICATIONS

- Managers, Casual Coordinators to drive messages
- Monthly update to HR Branch. Progress and next steps. Their involvement?
- Emails, emails and more emails

| Pre Go Live | | | | | | | | | | |
|----------------------|---|-----|-------------------|--|--|--|-------------------------------------|-------------------------------------|-----------|-----------------------------|
| Date to be delivered | ▼ | Spr | Stage | Event Name | Purpose | Audience/Stakeholders | Material Required | Channel/Mechanism | Status | Developer/Presenter/Communi |
| 25-Apr-18 | | | Build and Testing | UAT - Amendments and Termination | Test with Focus Group and representatives that the system works appropriately | Casual Coordinators, Casual Staff and SATAC, Focus Group | UAT testing environment and scripts | Set up training room with computers | Completed | Sasha MacGillivray |
| 30-Apr-18 | | | Pre Go Live | Casuals | To advise all casuals of the change in system | Casual staff members as listed in PeopleSoft | Overview of CAPS and Change Impacts | Email - both campus and preferred | Completed | Sasha MacGillivray |
| 01-May-18 | | | Pre Go Live | Change Impact Overview - Casual Coordinators - North Terrace | To advise Casual coordinators of the upcoming changes for Casual offers and timesheets | Casual Coordinators based around North Terrace | Presentation | Roadshow | Completed | Sasha MacGillivray |
| 01-May-18 | | | Pre Go Live | Change Impact Overview - Casual Coordinators - Waite | To advise Casual coordinators of the upcoming changes for Casual offers and timesheets | Casual Coordinators based at Waite | Presentation | Roadshow | Completed | Sasha MacGillivray |
| 01-May-18 | | | Pre Go Live | Change Impact Overview - Casual Coordinators - Roseworthy | To advise Casual coordinators of the upcoming changes for Casual offers and timesheets | Casual Coordinators based at Roseworthy | Presentation | Roadshow | Completed | Sasha MacGillivray |
| 01-Jun-18 | | | Pre Go Live | CAPS Demonstration and Project Overview | To showcase the new system to FEDS and FEMS to highlight all upcoming changes | FEDS and FEMS | Presentation | Demonstration | Completed | Sasha MacGillivray |

TRACKING CHANGE ACTIVITIES

| July 2018 | | | | |
|--|--|--|---|--|
| Adelaide, South Australia | | | | |
| Today 76°F/60°F Tomorrow 64°F/51°F Wednesday 59°F/48°F | | | | |
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| 25 Jun | 26 | 27 | 28 | 29 |
| CAPS Engagement Go-Live Week; HR Projects 9:00am COMMS - Go Live notifications 2:00pm R&A CAPS training; RMP ... | CAPS Engagement Go-Live Week; HR Projects | CAPS Engagement Go-Live Week; HR Projects 9:00am Canceled: CAPS Project - Go Live Workshop; Oliphant 213 SGD Room | CAPS Engagement Go-Live Week; HR Projects 9:00am Canceled: CAPS Project - Go Live Workshop; Oliphant 213 SGD Room | CAPS Engagement Go-Live Week; HR Projects |
| 2 | 3 | 4 | 5 | 6 |
| | 3:30pm CAPS Go-live Celebration; Level 3 RMP Room 7 and 8; HR Projects | | 1:30pm CAPS Action Mapping - Planned vs Actual Report; RMP L4 Mtng Rm 11 - Large/Conference (18p); Sasha MacGillivray | |
| 9 | 10 | 11 | 12 | 13 |
| 9:00am COMMS - Staff News - CASPA final submission deadlines | Sasha Leave; HR Projects 9:00am COMMS - Email - CASPA final submission deadlines | | | Stella - Annual Leave; Martina Varga |
| 16 | 17 | 18 | 19 | 20 |
| 9:00am COMMS - Staff News - CASPA final submission deadlines | 9:00am Payroll CAPS training; RMP L3 Mtng Rm 8 - Large / Conference (16+p); HR Projects 9:00am COMMS - Email - CASPA final submission deadlines | | 8:30am CAPS Timesheet training - HRSC and HRSOS; RMP L3 Mtng Rm 8 - Large / Conference (16+p); HR Projects | |
| 23 | 24 | 25 | 26 | 27 |
| CAPS Timesheet Go-Live week; HR Projects CASPA Last Submission deadline 9:00am COMMS - Timesheet Go-live | CAPS Timesheet Go-Live week; HR Projects | CAPS Timesheet Go-Live week; HR Projects CASPA Last Validation Deadline | CAPS Timesheet Go-Live week; HR Projects CASPA Last Escalation Deadline | CAPS Timesheet Go-Live week; HR Projects Stella on leave; Martina Varga 9:00am COMMS - Planned vs Actual |
| 30 | 31 | 1 Aug | 2 | 3 |
| 9:00am COMMS - Staff News repeat from 23rd July | | | | |

WHAT WENT WELL

What were our big achievements?

WHAT WENT WELL

- Business experience of Change Manager was a benefit
- Timesheet go-live was seamless
- Used key contacts in the areas as influencers
- Pop-up training videos for Casuals and Timesheet Validators
- Online training module for Casual Coordinators

KEY LEARNINGS

What could we have done differently

KEY LEARNINGS

- Less assumptions
- Get HR Hubs more involved
- Underestimated the impact of onboarding:
 - Usability
 - Proof of identity/Citizenship
- More detailed internal HR training
- Include technical training plan in change approach
- Reassessed if the members and purpose of the focus group was still relevant
- Should have Shared the benefits more
- Drop-in sessions for casuals at go-live
- Messaging coming from the HR Director where relevant

PRESENTERS

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Manager HR Systems and Change

The University of Adelaide

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**ALL ALLIANCE PRESENTATIONS WILL BE AVAILABLE FOR
DOWNLOAD FROM THE CONFERENCE SITE**



THANK YOU!



ADU 7-9 NOVEMBER 2018