

Quarterly review

Talent & Culture

Q2 - 2015/16

Approximate team size during this quarter: 7
Time spent: strengthen 50%, focus 30%, experiment 20%

Q2 - Talent & Culture - *Boryana*

Objective: T&C



Objective	Measure of success	Status
Boryana onboarding - Culture discovery process <i>Team members involved: 3</i> <i>Staff involved: numerous</i>	Document, share & seek calibration & final confirmation of cultural pillars to follow when creating any HR initiative	Completed and posted summary on personal page for feedback and comments
T&C team strategy <i>Team members involved: 2</i> <i>Staff involved: numerous</i>	Defined & documented strategy for T&C team, gain leader consensus	Strategy completed and shared with stakeholders. Strategy will get refined and project priority order may change depending on org needs.
Board Recruiting Team members involved: 2 <i>Other involved: staff,</i> <i>community, board,</i> <i>advisory board,</i> <i>BGC (leading effort), etc.</i>	2 trustees appointed by board	2 trustees appointed by board. One resigned. BGC restarting process

Q2 - OD - Boryana

Objective: Performance Mgmt



Objective	Measure of success	Status
Update Performance Management - phase 1 - prototype <i>Team members involved: 4</i> <i>Staff involved: numerous</i>	Updated annual review process to a more concrete, quantifiable and measurable structure. Find ways to facilitate cross-org calibration.	Prototype plan created and going into feedback phase. Phase 2 for user testing is in January of FQ3.

This project has been challenging since the Learning & Development Lead has not yet been hired. A contractor has been engaged to help push the initial work to stay on track for the May/June review season.

Learning: Learnings will come with the user testing. Initially: 1) staff love their 360 reviews, 2) calibration of ratings for consistency between departments will be a challenge, 3) the overall process needs to be kept short and simple.

Rod Dunican has led the process, with logistics support from Anna L. and historical information & advice provided by Joady.

Q2 - OD & Recruiting - Amy & Boryana

Objective: Recruiting



Objective	Measure of success	Status
OD Team Hiring <i>Team members involved: 5</i> <i>Staff involved: numerous</i>	Hire Learning & Development Manager	PENDING - Finalists selected. Working through final logistics
Engineering Hiring Event - phase 1 <i>Team members involved: 3</i> <i>Staff involved: 3</i>	Number of attendees	PENDING - Wikimedia Tech Talk scheduled for February 24 2016: 2 speakers (Moriel, Aaron H)
Agency vendor streamline <i>Team members involved: 3</i>	Bring all existing agency relationships into Recruiting Create process for Recruiting to be the only point of entry for agencies Create a preferred and approved agency list that will have standard terms and conditions	POSTPONED - This goal became less of a priority, thus postponed, as all recruiting needs were able to be handled in-house.

Q2 - Recruiting - Amy & Joady

Objective: Job Descriptions

Objective	Measure of success	Status
JD project <i>Team members involved: 6</i>	JDs reviewed, streamlined & leveled (for Engineering - other depts to follow)	Recruiting created template level JDs with HR for Product for each band. Draft Product level chart created in FQ1 by HR, to coordinate with Radford data.

Additional changes in Product/Engineering teams & roles made additional work on this goal challenging. Draft work has been finished but additional work with managers is needed before it can be rolled out to staff.

Learning: Blanket JDs for all Product will not work considering the variations required for each team, but general levels can be detailed. Closer coordination with Radford formats will provide the best matching to compensation and experience.

Objective	Measure of success	Status
Successful Open Enrollment <i>Team members involved: 3</i>	Benefit budget increase kept under 13.6% (the budgeted amount for FY15-16) Open enrollment completed on time by December 12/11/16	Planned (as per expected growth) annual increase reduced by 5.7%, to 7.9%. 95k annual savings. Open enrollment completed on schedule, with only 2 staff members requesting extensions due to their schedules.

It has been HR mission to create a quick and simple open enrollment, that minimizes work for staff, and maintains strong, stable & cost effective benefits.

Learning: Staff continue to value high contact with HR during open enrollment. Our brokers at Johnson & Dugan continue to represent WMF well to reduce carrier rates. PlanSource had some back end glitches due to a recent upgrade on their part, but staff did not experience it.

Elena successfully managed open enrollment, including communications to staff, several open office hours for staff, updates of all changes into staff plan materials, and coordination of the entire process with the brokers & carriers. Dan D. assisted with data coordination.



Objective	Measure of success	Status
Run an updated engagement survey for req number staff, with high participation. <i>Team members involved: 3</i>	Run 2015 engagement survey for req# staff with 75%+ participation	Exceeded participation by 18% with 93% (2013 was 58%) Results shared on time Expanded goal: Added contractor survey completed with 84% participation

This was a last minute goal that was added for HR, and was able to be run on short notice. Culture Amp supported providing results summary.

Learning:

- Next time conduct a simultaneous contractor survey, with questions limited to those that pertain to them.
- Next time have Culture Amp take over completely by not only summarizing results (as in round one) but also presenting findings to staff, execs, board, at metrics, etc.

Q2 - HR Ops - Joady

Objective: Onboarding/Offboarding



Objective	Measure of success	Status
Req# onboarding & offboarding streamline - phase 1 <i>Team members involved: 4 (plus 8+ non T&C staff)</i>	HR, OIT & Administration has a fully documented process that integrates into a master process list.	Process maps for on & off boarding for HR, OIT, Admin, Finance & Tech Ops created on time and approved by respective teams.

With the process map created, this will help with the next phase of creating new systems to automate and streamline much of the processes, with the new HR Programs & Systems Manager.

Learning: Cross team collaboration can be challenging, with each team having different agendas and a different level of preferred detail.

Anna L. successfully led the project coordination, following up with all non T&C team members, making sure they stayed on track and informed.

Q2 - OD - Joady

Objective: Online Training

Objective	Measure of success	Status
Implement Training Resources and System <i>Team members involved: 2 (and Legal)</i>	Roll-out Mindflash for training access and tracking	Mindflash rolled out on time, with 5 T&C modules and 1 Legal module

HR and Legal needed a learning system that allowed for interactive training, that could be tracked and completion confirmed for risk management. Legal selected Mindflash in FQ1, with the system rolled out in FQ2.

Learning: More coordination will be needed for linking what staff want to have on Office Wiki and what is in Mindflash.

Legal led the project, with Joady & Anna L. advising. Anna led the addition and coordination of the T&C modules.

Regular Work:

- Exec Recruiting: CFO search complete
- Recruiting: Ongoing candidate experience data collection & analysis
- Safety: plan drafted and out for comment from staff, materials for emergency response, and presentation to managers meeting on safety, the emergency plan, workers comp, & ergonomics
- Immigration: successful internal case audit (with only one update for an extra day of remote work for one staff member)
- Benefits: ACA analysis complete and PlanSource ready for 2016 reporting, ongoing leave plan support
- 401k: amendments finalized, conducted a day of 401k/financial education for staff
- Workers Comp: review of worker's comp carrier regarding issues and options, 2 complex cases
- Payroll: year end payroll wrap up
- Compensation: review of diversity within comp, data crunched for promotions & increase PANs
- Reporting: created T&C systems map, created master data
- T&C Team Training: Completed FQ2 education session with outside counsel. Boryana presented at LinkedIn Talent Connect
- Collaboration: assist team changes with CE, internal controls audit with Finance, disaster recovery plan with OIT, data privacy with Legal, liability insurance renewal with Finance, SHP training review with Legal
- Fun: hosted the staff Halloween party, assisted with the December holiday party

Q2 - Talent & Culture

Core workflows and metrics

Category	Workflow	FQ2 Metrics	FQ2 15-16	FQ1 15-16	FQ4 14-15	FQ3 14-15	Type
Recruiting	Interviews Scheduled	Interviews scheduled, not including phone screens	414	252			M
	Positions Recruited	Open regular, contract & temp/intern positions with active recruiting	26	24			M
HR	Onboarding (req#)	New hires with req#s	22	21	33	12	M
	Offboarding (req#)	Voluntary & involuntary req# departures	5	9	10	9	M
	Contractors & Temps	New and renewed contracts	84	71	77		M
	Immigration	Active cases (H1B, F1, J1, green card)	46	42	42	40	M

Type: new, reactive, maintenance