



Scotch College Improves Workforce Planning Decisions with the Help of Solver

Scotch College, located in the Western region of Australia is one of the top private schools for boys in the city of Perth. It provides education for students from pre-kindergarten to year 12. One of their biggest administrative challenges centered around workforce planning. Inconsistencies in the data they were using when planning staffing needs caused significant challenges in establishing realistic budgets and effective staffing schedules. Through Solver APAC and their partner, Access Analytic, Scotch College found the Solver solution. With Solver, Scotch College was able to create one version of the truth as it relates to their workforce data and used it to improve accuracy when forecasting workforce needs.



scotch.wa.edu.au

Company Profile

Scotch College is one of Australia's leading independent private Christian schools for boys in Perth for Pre-Kindergarten to Year 12. It was founded in 1897 by Jane Alexander and her husband, Scotch who believed that all boys were built differently. With that mindset, they established an educational program that not only inspired excellence but centred on imbuing students with the skills, resilience and empathy that will prepare them for life. Scotch has approximately 200 students in Pre-Kindergarten to Year 5, 500 students in Middle School from Years 6 to 8, and 740 Senior School students from Years 9 to 12. Students come from areas as diverse as China, Singapore, regional and remote Western Australia, interstate and more.

Industry:
Education

Country:
Australia

ERP System:
Other

When asked about the best features of Solver: "The reporting tool and the flexibility to tweak and modify reports quickly to suit our purposes."

*~ Ian Anthony, CFO,
Scotch College*

Challenges

Guiding young boys and men to become well-rounded contributors to society requires a balance of the right skilled staff, administration and educators who can share their wisdom across many aspects of life. Not only is it vital to foster academics but develop a sense of community and involvement along with positive social interaction. A challenge that Scotch College wholeheartedly embraces yet found to be more difficult to accomplish with the resource planning technologies they were using.

A necessary component to developing a successful wholistic approach to learning required effective use of their staff and

instructors to manage the myriad activities and curricula available for students.

Scotch College's current planning system unfortunately couldn't accommodate their growing needs for an effective workforce planning solution. In speaking with Ian Anthony, CFO of Scotch College, he mentioned a few of the challenges.

For example, the administration experienced discrepancies in what their human resources system listed for resources versus what their payroll system presented. It was important that the administrators could match up staffing levels for full time employees and be able to determine the correct budget numbers they needed for the various elements and activities they provided on campus.

Using the current system, administrators experienced seeing different budget numbers, so it was difficult to determine accuracy. With staff costs a significant part of the overall budget, it was imperative that these operating expenses were better monitored and maintained to improve efficiencies.

Solution

In their search for a better workforce planning solution, Mr. Anthony and his project team reviewed several different options, including ones from Adaptive Insights and Crowe Technologies. They even considered just using Power BI. Although a few of the options they were considering had elements that they liked, Scotch College found that Solver had a better workflow option compared to the others, and it was more intuitive to use. They also considered Solver because it would allow their own users to self-manage changes to their reports and input templates.

As part of the selection process, Scotch College worked with Solver APAC's partner Access Analytic to assist them with the implementation.

The initial project plan included integration of human resource, payroll and general ledger data into Solver for the reports Scotch wanted. In the beginning the primary users were expected to be the CEO and CFO. The setup would also provide a few reports, such as forward enrollment, to a few other co-workers, along with the ability to export PDF reports to several more.

Prior to Solver, Scotch College would utilize Crystal Reports to provide this, which would then require IT support to get involved. Once the system is fully operational, the reporting capabilities will likely change. Scotch realizes they will need to devote a little more time and resources to plan that rollout more strategically.

Going beyond financial data management, Scotch College uses Solver to report staff demographical information to the Commonwealth. They have also begun using Solver to forecast enrollment numbers several terms and years forward with better accuracy. One of the positives Scotch College has come to realize is the ability to customize the application to suit the school's particular requirements for reporting.

Solver's performance has exceeded Scotch College's expectations. It performs their critical processes really well and is more powerful than they expected. One minor challenge is that it can be a little more complex at the beginning, but once you understand the basics, the features and setup make sense. If you are an "enthusiastic amateur" it might take you a little longer to get up to speed, especially if you only use it once every so

often.

The best features of Solver that Mr. Anthony has found so far: "The reporting tool and the flexibility to tweak and modify reports quickly to suit our purposes," he mentions. "The fact that our own users can make the changes themselves is a huge advantage. That there is no longer a need to have IT support our reporting efforts saves not only time but frustration in having to wait on someone else before you can finish your own work." Additionally, Ian mentioned that the college has a newfound level of confidence in the accuracy of the data used in their reports.

What's Next for Scotch College?

Ian is very pleased with how Solver has improved their workforce planning, though it's still too early to tell how much of an impact the change has made on their ROI. Mr. Anthony's immediate goal is to gain proficiency in this new system and to see how this budget season goes while using Solver's budget module. Then maybe to come up with a 12-month plan. Though Ian Anthony does have some ideas of how he wants to expand the use of Solver. He still wants to bring in Power BI and he thinks the next addition to the system will be to pull in timetable information.



Summary

Overall, Scotch College has been very happy with Solver. They really like the reporting templates and are pleased that they can make updates themselves. They find that the data that's being pulled from their human resources and payroll files into Solver is much easier than pulling data from Excel.

They've had good support from Solver and Solver's partner, Access Analytic, and plan to meet with them soon to start strategizing for stage two development. One piece of advice Ian would give to anyone in the position of updating their ERP systems: "You can show Solver how you do things today and they can replicate it. But before you completely move forward with the project, don't miss this opportunity to re-engineer your processes. Think about what you need for the future and give this as a requirement to Solver." 🚀

Resources

[Budgeting and Forecasting](#)

[Case Study: Ducks Unlimited](#)

[Faster and Better Decisions with Power BI and Solver](#)

[Student Enrollment Dashboard for Higher Education Institutions](#)