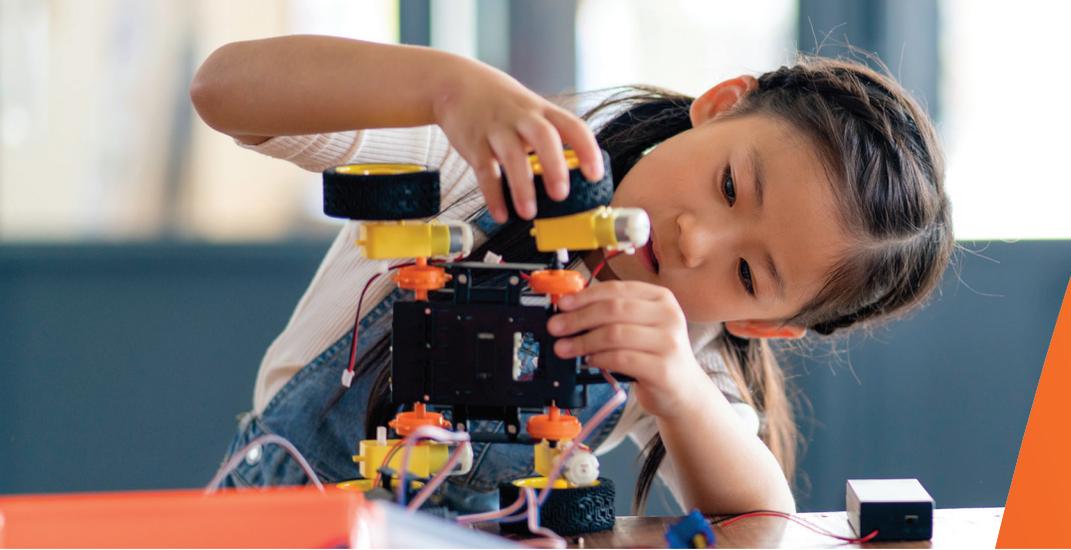


case study

Educational Technology Nonprofit Aces HR, Saving Over 1,200 Hours a Year with Paylocity





Bogged down by manual payroll processes and stratified HR workflow, NWEA needed a payroll and HR solution that would help the HR team convert lost time into strategic initiatives.

The Challenge

NWEA is a research-based, not-for-profit organization based in Portland, Oregon. For 40 years, NWEA's assessment solutions have changed the landscape of education — providing insights for customized instruction and ensuring students from 145 countries can operate at the top of their abilities. And with a bold mission — Partnering to help all kids learn® — it's always been vital that NWEA's diverse team of employees and contractors spend less time on paperwork and more time creating educational equity and reducing structural inequality. With big goals around diversity, equity, inclusion, and accessibility (DEIA), NWEA didn't have an easy way to access current demographics or turnover.

While NWEA excels at learning innovation, using a manual approach to performance management meant endless data entry, hours lost chasing down approvals, and stacks of employee paperwork piling up. NWEA needed to streamline its processes, automate essential tasks, and add self-service functions, freeing up HR personnel to further NWEA's mission and focus on key, strategic initiatives, like continuing to create an inclusive work environment.

With a diverse workforce of more than 1,150 employees, including 800 regular employees and roughly 350 contingent workers, payroll alone would take Jaime Freeman, Director of HR Operations and Total Rewards, two entire days every month to process. The HR team spent dozens of hours entering data in multiple places, needlessly printing paperwork, and wasting time storing paperwork. The challenges NWEA had with their HR and payroll management practices took them away from strategic work. They needed a solution and fast.

The Switch

After going through a handful of HR and payroll providers, such as ADP, Ultipro, and Oracle, NWEA opted for Paylocity in 2017. Jaime explains, "So what I'm always looking for is what's going to be not just the easiest for employees, but easiest for us as administrators as well. That's probably why we did not stick with two of the previous ones for very long because they just weren't easy to use." As a long-time HR professional, Jaime wasn't new to the implementation process, but it was different with Paylocity. She notes, "This was probably the easiest. It was clean and quick." From templates to auditing, switching over to Paylocity gave NWEA's HR team their time back.

Company
NWEA

Industry
Nonprofit/Educational

Location
Portland, Oregon

Size
1,150

Customer Since
2017

Challenge

With big goals around diversity, equity, inclusion, and accessibility (DEIA), NWEA didn't have an easy way to assess current demographics or turnover.

Featured Solutions



Results

Paylocity enabled the DEIA team to track retention and hiring data, ensuring all people have equal access to opportunities at NWEA and a work environment that sets them up to succeed.

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And while change can be challenging and meet resistance in any organization, NWEA's team welcomed the solutions. Jaime explains, "There was no pushback." With employees from multiple departments on board, NWEA could start to see the changes take hold and watch the benefits of partnering with Paylocity roll out in real time.

The Approach

The solutions to NWEA's challenges were three-fold: use the Performance Management module to create consistency across the organization, automate payroll and HR processes, and implement self-service options for employees. Jaime says, "We've freed up more than 100 hours per year by automating most of the recruiting and onboarding process, and employee requests overall dropped 75%." She adds, "More importantly, with significantly fewer errors and less manual administrative tasks, we're making more of a strategic impact across the organization."

Saving Time By Streamlining

Before Paylocity, disconnected performance management systems meant disjointed information for NWEA. Jaime notes, "It was a nightmare. Every team in the past was kind of doing their own thing. There was no consistency, no consolidation. Paylocity has just been indispensable by helping us formalize a performance review plan and program."

With the new system in place, Jaime explains, "Our merit process is so simple because we used to do it in spreadsheets and then have to upload it into our payroll system and to be able to just have the managers do it all within Paylocity, be approved by leadership, and then submitted into employees records is fantastic. That's huge time-saving for us."

Paylocity's Performance Management tools helped HR and leadership streamline their process creating more continuity between teams and saving 1,200 hours a year in administrative time. According to a recent study by Deloitte, ditching manual performance management in favor of automation could result in cost savings of \$20,000 a year.¹

Reducing Errors Through Automation

Now that NWEA has automated their HR processes through Paylocity, employee information only needs to be entered once, reducing the risk for errors, and saving the team at least one hour per new employee. When it comes to payroll, Jaime says, "Payroll used to take me forever. And I got to the point with Paylocity that I could do it in maybe an hour and a half—with our time back [from automation], our DEIA team can use Data Insights to track retention and hiring data, ensuring all people have equal access to opportunities at NWEA and a work environment that sets them up to succeed."

¹ https://www.paylocity.com/media/z0eiw0en/roi-of-an-hcms-12_29revision.pdf



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Jaime Freeman, Director of HR Operations and Total Rewards



“It frees me up to be that strategic thinker. I'm able to look three years in the future and say, this is what we want things to look like based on all these different areas and then work backward to figure out how to get there.”

Jaime Freeman, Director of HR Operations and Total Rewards

Empowering Employees to Access Their Information

Self-service functionality added autonomy to NWEA's people management processes, improving HR workflow, and empowering employees. Using Paylocity's platform, the HR team reduced high-touch manual tasks by 75%. Self-service reduced unnecessary requests by giving managers and employees access to their documents, including W4's, direct deposit, and pay stubs. Jaime notes, “The visibility saves my team a whole lot of time.”

But the employees enjoy the benefits of self-service functionality as well. Jaime says, “We used to have an outside COBRA vendor and an outside FSA vendor, and this year we moved them both onto Paylocity. So that's been a big help for our employees.” Employees prefer to have all-in-one access to their benefits rather than having to sign in to multiple outside vendor systems. And using open enrollment for benefits through the self-service portal has reduced the administrative burden by over 50%.

The Future

While NWEA changes the future of education, its partnership with Paylocity is changing the future of people management. With many hours saved through the automation and streamlining process, NWEA's HR department has more time for what matters. As Jaime notes, “It frees me up to be that strategic thinker. I'm able to look three years in the future and say, this is how we want things to look like based on all these different areas and then work backward to figure out how to get there.” And as the company evolves, Jaime knows Paylocity will evolve with them. She says, “Paylocity listens to their clients when they say, ‘Hey, it would be great if you added this or if it could do this.’”

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– Jaime Freeman, Director of HR Operations and Total Rewards