A Lesson in Modernization and Administrative Efficiency

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Forward Together.

HathawayBrown

Hathaway Brown School replaced burdensome HR and payroll processes with modern, technology-powered best practices to give school staff the freedom to focus on preparing their students for the life ahead.

The Challenge

Hathaway Brown School is driven by a mission to provide an inclusive environment for girls kindergarten through 12th grade, and both girls and boys in its Early Childhood Program. Founded in 1876, the school is committed to a fusion of academic and experiential learning captured in its motto of "We learn not for school but for life." The school also promotes development for its staff, encouraging every teacher and administrator to participate in professional training every year.

Gerri Jeffrey, Director of Human Resources, joined Hathaway Brown School in 2012 with responsibility for 200 full-time employees in addition to part-time staff, seasonal coaches, substitutes, summer program staff, and more. She managed payroll related to more than 500 W-2s and manually handled endless other tasks like benefits enrollment, vacation time tracking, recruiting, new employee onboarding, and staff development.

Gerri found payroll to be a struggle and a big drain on her time, even after deploying a competitor's solution. "I was having to submit payroll before I was done reviewing it because it took so long. I would have to go back and fix things and then write checks manually to address the errors," she said. Reporting was a challenge as well, and Gerri felt like she needed programming skills to get information out of the system.

Compounding these issues was the fact that the payroll system didn't speak to the other HR systems, like 403(b) and benefits, creating even more wasted time. "I was working long hours. Many nights, I was here until 9 or 10 o'clock," said Gerri.

"With Paylocity, everything is just common sense."

– Gerri Jeffery, Director of Human Resources

Company
Hathaway Brown School

Industry
K-12 Education
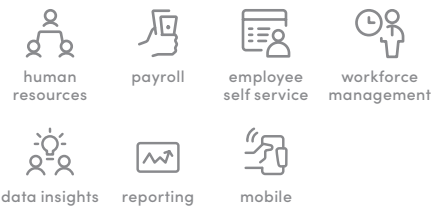
Location
Shaker Heights, OH

Size
300+ Employees

Customer Since
2014

Challenge
Modernize administrative infrastructure to streamline manual business processes

Featured Solutions

human resources | payroll | employee self service | workforce management

data insights | reporting | mobile

Results
Eliminated substantial administrative burden for HR team

Empowered employees to track and update payroll and benefits information with Self-Service Portal

Reduced time to reconcile and process payroll from days to hours

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The Approach

A Solution and Implementation that Made Sense

Gerri was intent on finding a way to do things more efficiently and after discussing it with the CFO and Head of School, they all agreed that improvements were needed.

"I started by asking my counterparts at other schools what they were using for Payroll and HR and one mentioned Paylocity and how pleased they were with their decision."

During her evaluation of several potential solutions, the choice became obvious when she saw how comprehensive and intuitive Paylocity was to use. "It just made so much sense when I tried it. It was so easy to follow. I knew that switching over to Paylocity would immediately save a lot of time."

Hathaway Brown first implemented HR, payroll, and Time & Labor solutions. Paylocity's step-by-step implementation plan and resources helped ensure everything was correctly set up for payroll processing and HR management. The process began with the setup of the different accounts and departments, and working with Gerri to determine exactly what she wanted to see in reporting. Then the Paylocity implementation team helped upload the existing data from the school's previous system to ensure historical data was available when the new system went live. From there, the school was ready to start taking full advantage of Paylocity and all its benefits.

Latest Technology Made Easy with Self-Service

One of Gerri's primary goals was to reduce the administrative burden by giving faculty and employees the ability to access and update their own payroll and HR information. Paylocity's self-service functionality empowers employees to view their information, initiate requests, and update all of their personal data on a single platform without having to call Gerri. Staff is now able to view their paychecks, request time off, check vacation and sick day allowance, adjust exemptions, and more. The Paylocity Mobile App gives them the ability to complete these tasks from any device, and managers can even review employee hours and approve time off requests.

"The Paylocity Time & Labor module was super easy too," said Gerri. "Our hourly employees were using old-fashioned punch timecards, and I had to manually add those hours for payroll. With Time & Labor, all they have to do is clock in and clock out, and we can upload those hours into the payroll. It's a huge time-saver."

Another important advantage is Paylocity's ability to manage Hathaway's unique retirement plan contributions. The school matches employee contributions to 403(b) retirement plans at different amounts depending on employment type and tenure. Their previous solution had a difficult time getting it right. With Paylocity, it was all set up in the back-end, so Jeffrey knew everyone would get the right percentage match, every pay period.

"In the five plus years that I've worked with Paylocity, I have spoken with a live person who could help me every time I've called."

– Gerri Jeffery, Director of Human Resources

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Easy Reporting for Peace of Mind

The pressure is off Gerri to know all the tricks for pulling the data she needs. With Paylocity's rich and robust Data Insights dashboards, she's able to accomplish her job much more quickly and get the answers she needs when she needs them, from year-end payroll tax reporting to policy compliance.

"We have our employee handbook that's updated every year and we want to make sure that everyone reads it. I have it set up so that they have to check the box to acknowledge that they have read it. All I have to do is go into my acknowledgment report, and I can tell you exactly who signed off on it and who didn't. That saves so much time."

"The fact that Paylocity is so strong in what they do frees up our staff and faculty to focus on what's really important to us — equipping our girls to go out in the world and make a real difference."

– Gerri Jeffery, Director of Human Resources

The Payoff

Beyond HR & Finance

Gerri is enjoying a more balanced life, and the school has made tremendous progress in its efforts to embrace the latest technology and automate more of its back-end processes. The administrative burden for the HR team has been reduced substantially and the school's staff is embracing the new system.

It took some time for employees to adjust to not receiving paper pay statements, but they now appreciate the ability to view all the information they need from any device at any time online, knowing the correct amounts will be in their banking and retirement accounts every time.

Paylocity's customer service has also made a real difference for Gerri. "When you are working on payroll, and you get stuck, the last thing you want to do is wait for someone to call you back. In the five plus years that I've worked with Paylocity, I have spoken with a live person who could help me every time I've called. They have a great team system that keeps everyone up to date on what's happening at the school. That's huge."

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