

# MANAGING HR IN EDUCATION: Thinking Differently and Supporting The Mission

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How one amazing HR team kept their focus on students and educators through innovative thinking and some simplification from SentricWorkforce®



When the HR team at The Vista School set out to find a cloud-based HR solutions partner, the search was driven by the need to find a company that could adapt to the school's requirements for managing a unique educational model.

In general, managing HR in education poses a special balancing act. Unlike in the private sector, where HR managers first seek ways to keep employees engaged in the organization, the education HR manager first looks to better support the teacher's engagement with his or her students (and then promote organizational commitment). HR demands compete for a teacher's precious time – time spent either with, or preparing to be with, students. That tension becomes more pronounced when the students have special needs and the team that supports those kids includes diverse professional skill sets – such is the case at The Vista School in Hershey PA, an alternative educational and therapeutic program for children with Autism Spectrum Disorder (ASD).

ROD MCALLISTER, who goes by the title Human Resources Business Partner, does not just embrace this balance, his discussions about HR lead with The Vista School's mission:

“Ask a parent of a child with ASD about their day, and they can probably give you a schedule down to the half hour as well as the structure of activities that fill those blocks of time. But more telling will be the names and relationships of the child's support team who punctuate the discussion, those who form the foundation for far more than a much needed routine. This demand for ASD support is why The Vista School exists, and why we're a purpose driven organization. Our goal is to put ourselves out of business and equip these kids to go into the world.”



## WHAT IS THE VISTA SCHOOL?

The Vista School is actually two organizations. The school is officially licensed as a private academic day school, while The Vista Foundation is a second arm, licensed as a behavioral health organization.

“There are only about a dozen schools in the country even remotely similar to our comprehensive service delivery model,” explains McAllister. “With nearly 90 students and growing, we're among the largest.”

The dual-purpose structure means The Vista School is regulated by both the Pennsylvania Department of Education (“PDE”) and the Pennsylvania Department of Public Welfare (“DPW”); while the service delivery model of a nearly 1-to-1 staffing ratio for the kids means lots of administration, data, compliance and certifications the HR team has to monitor. This model also means a workforce that is both on campus and in the field, and in the field means in 30 home school districts across nine counties in the region.

The HR team's responsibilities also include managing the happy problem that the model works. In 2002, The Vista School had eight employees and four students operating out of the basement of a building. Today, there are more than 150 staff members meeting the needs of 86 students on a small campus. “Twelve years ago, those students were seven or eight years old,” says McAllister. “Today, they are 20 and graduating from our school. We're licensed for ages three to 21 – and we're looking at how to transition them to what's available in their next stage of life.”

Anticipated future growth for The Vista School includes adult and career services for the students who are outgrowing the school's current age limit, as well as potential residential opportunities. That will mean not only more staff and students, but more licensing, more specialization, more people on the run to manage, and more certifications.

## UNCONVENTIONAL MODEL EQUALS RAPID GROWTH AND COMPLICATED REGULATORY DEMANDS



# FINDING A WORKFORCE SOLUTION TO HANDLE IT ALL

When the time came for the team to look for a new HR platform, a series of ‘must-haves’ that were rooted in this unconventional – but highly effective – approach quickly emerged.

“Because we have two distinct but closely related entities, we needed a way to view and manage both organizations together, while having the capability to separate them for auditing purposes. We needed an organizational and a consolidated view. But that was just the start of our needs. So we created a score sheet of a dozen different factors we would score against as we brought HRIS providers in.”

CARVEL KEISER  
Information Technology Manager

## OTHER NEEDS, MANY OF WHICH WERE TIED TO THE ORGANIZATIONAL MISSION AND MODEL, INCLUDED:

### TRAINING AND EDUCATION

The scheduling and delivery of training is audited by both PDE and DPW.

### ATTENDANCE MGMT & PTO FORECASTING

To attract the best talent, The Vista School has a robust and complex paid time off (PTO) and attendance policy. They track six different time accrual categories, give employees up to five weeks of PTO per year, and add enhanced PTO based on years of service. Prior to SentricWorkforce, that data was manually tracked by multiple outdated and feature limited systems. Everyone had one PTO bank and Megan Young, the Business Support Specialist, manually entered each person’s approved requests into two systems. In addition to this tedious and time-consuming approach, “Minimizing unscheduled leave and adapting to unforeseen events is a must when the students depend on employee attendance daily. Forecasting PTO was critical, and so many tools just didn’t have it,” says Young. Better attendance management is not only leading to hours saved, but direct bottom line impacts.

### RECRUITMENT

“Bringing in new talent while monitoring turnover is a huge part of managing our growth and was a process we were doing completely manually,” says McAllister.

### BENEFITS ADMINISTRATION

With a youthful workforce accustomed to managing their lives online, a manual benefits process was less than ideal and in need of modernization.

### WORKFORCE CENTRALIZATION

The Vista School’s model also helps deliver reinforcement and consistency in the home. They put over half of their staff in the field, working with students and families in environments off campus. Streamlining and bringing key functions into one online location (cloud-based) would mean field employees had ready access (from their own homes) to organizational communication, PTO requests and approvals, paycheck information, news, benefits administration, training, personnel information, and performance – all with minimal interruption to student engagement.

### CERTIFICATE TRACKING

To maintain compliance, The Vista School tracks licenses of all pertinent employees, including behavioral and psychological therapists, occupational therapists, speech and language pathologists, physical therapists, educators, consultants, school nurses, and various support staff. Licensing also extends to “basics” like first aid and CPR training.

#### EMPLOYEE SELF SERVICE/MANAGER SELF SERVICE

Knowing much of the staff was in the field and needing central access to individual HR data, ESS / MSS became mandatory to enable the behavior the team wanted to encourage. ESS/ MSS was crucial in empowering their staff by shifting many routine questions and tasks away from an overloaded administrative team to the chosen HRIS system, thus allowing everyone to work smarter.

#### WORKFLOW AUTOMATION

The school's organizational structure further complicated approvals of everything from absences to performance. There is not a typical manager / employee structure. Based on time of year or week of the month, approvals might go to one group or supervisor. Automating this complicated approval tree saves the HR team several hours every week.

#### PAYROLL INTEGRATION

The school pays employees twice a month, and they pay live, meaning there is no delay in paychecks for onboarding new employees. Young says this is great for employees, "But a huge paperwork nightmare." They wanted payroll integrated into the platform so they could automate workflows, improve error rates and tie it to the attendance module.

#### TECHNICAL

Serving a dispersed employee base made a cloud-based approach a no-brainer. Security (SSAE-16 compliance, data center tier, redundancy, and disaster and recovery) and IT involvement also played a major role in the type of partners The Vista School considered.

An internal team of stakeholders helped create the above list and the search team got down to evaluating nearly a dozen competitors. "We looked under every rock and compared every possibility against another. Ultimately, we brought in about six providers for demos and went through some detailed questions. Maybe this will be surprising to some people, but we eliminated most of the big players based on past experiences and feedback from other people who had experience working with them," said McAllister.

Other factors beyond the detailed list outlined above were price, support and flexibility. The team chose SentricWorkforce after several months of research, demos and evaluations.

## THE DECIDING FACTORS

SentricWorkforce did all the things that The Vista School needed it to do. But beyond a "bake-off," why did this team go with us? In their words:

#### AN INTUITIVE TOOL (FROM KEISER):

"Right from the beginning, just looking at the system, we could tell right away it was designed logically. We looked at a lot of other systems that did more things, but they were so hard to use. SentricWorkforce did everything on our list and it did them well. Perhaps most importantly, the Employee Self-Service tool is extremely easy, which means people would and do use the system."

#### PEOPLE THAT CARED GOING FURTHER:

McAllister also mentioned the Sentric sales representative as a determining factor, "Tracy [Null, VP of Business Development] came here and learned our business and asked really smart questions. Like I said earlier, we're a purpose-driven organization and that mattered to us. Not everyone did that. In fact, almost no one took the time with us that Tracy did." Later on, the team would call out Sentric's implementation manager as "one of the best project managers we've ever worked with."

#### MID-MARKET, MID-SIZED PLAYER:

"If we we're going to provide advice to an organization with complex and specific needs like ours, my two cents would be, mid-market, mid-sized partner. We found a system that meets our needs and has enough flexibility for our growth. We were worried about big players saying, 'here's what you get and you change to suit us, as opposed to we'll help you work within the solution to meet your needs,'" says McAllister.



## FROM PROSPECT TO CLIENT: ANOTHER ATYPICAL MODEL

“The only thing surprising about going through implementation,” says Keiser, “was how smoothly it went. Rob and I have been through a lot of these things (and went through another one at the same time that made Sentric look even better), and this was by far the best experience we’ve ever had. We just had one of the best project managers we’ve worked with in Rob [Cobb, Sentric Implementation Manager].”

Calling out employees by name isn’t a phenomenon unique to The Vista School / Sentric relationship. In our 2013 annual survey, we asked clients why they would recommend Sentric to peers – and they called out, by name, nearly a dozen employees. Most of those employees were called out multiple times. Our dedicated service model cultivates an atypical relationship between workforce provider and client, the phenomenon The Vista School experienced first-hand.

According to The Vista School team, Sentric’s implementation manager was, “well-organized, gave us a list, deadlines, told us what we needed to do, worked with us as a team and helped us break off the different components that he needed to get his job done. He was always available and there were never any big delays.”

After implementation, The Vista School began rolling out SentricWorkforce to the entire organization in a staged approach. Starting with ESS and payroll, the team strategically forced employees to log in to access paystubs. The rollout was timed with annual salary adjustments, so if employees wanted to know the size of their pay increase (which were generous that year), they had to begin using SentricWorkforce right away. Shortly thereafter, the team eliminated paper PTO requests, so if employees wanted to request time off, they had to continue using SentricWorkforce. In addition, the team significantly cut back on school-wide emails and now typically uses ESS for the vast majority of all internal staff HR communications, including news, job postings and other updates.



## A MUTUALLY BENEFICIAL EXPERIENCE

The Vista School’s experience has turned into more than a great example of Sentric’s product and business model. For our sales and implementations team, it has become an example of how clients can better advocate for themselves.

From our perspective, The Vista School did several things that attributed to their own high level of satisfaction. Without taking from the hard work of Sentric’s team, here are the top behaviors Tracy Null (sales) and Rob Cobb (implementations) saw from The Vista School that elevated this project from a great win, to “a dream client”:

### CONVERSATION

“The relationship was started with an attitude of openness and partnership,” says Null, “and that’s a tone that we always try to influence but is usually controlled by the client. We can only affect what we know about, and this team’s willingness to share and disclose their challenges made a big difference.”

### TEAM ENGAGEMENT

The due diligence and committees formed on The Vista School’s end never left any doubt that the right people who would use and manage the product would know exactly what they were getting and have ownership over the final decision.

### LEADERSHIP INVOLVEMENT

According to Null, McAllister’s involvement helped keep conversations rooted in “reality.” However, he struck a strong balance with giving the rest of the team ownership and a voice.

### A POINT GUARD

Moving from one stage to next is more seamless when one person on each end acts as a driver, so Sentric brought Null to the table and The Vista School brought Keiser. That same ownership model continued with Rob Cobb and Keiser through implementation, and then Young and our service team today.

### HAVING A VISION FOR THE SOLUTION

“This client didn’t send us a lengthy request for proposal,” says Null. “That’s not a knock on RFPs, but they all ask the same questions and I’ve seen many that require a lot of information without ever getting to the heart of what a company really needs. This client took the approach of a long, but very real checklist that was specific to their challenges and priorities. It made it much easier to be effective and focused.”



The summary of The Vista School / Sentric relationship was best articulated by Keiser in his online review of SentricWorkforce, it was all

**“EVEN BETTER  
THAN EXPECTED”**

