

2018 DMEC ANNUAL CONFERENCE

Frisco School District: Leading Leave Compliance In Texas

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Today's Agenda

- Overview of Frisco, TX
- The Growing Frisco Independent School District (FISD)
- FISD's Original Leave Management Program
- FISD's Leave Management Program... 2.0!
- The Results
- Goals & Looking To The Future

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Today's Key Takeaways

- *Gain an understanding of the unique challenges of leave management in the education sector, and in a workplace with continuous growth*
- *Review the outcomes of Frisco's movement to a software solution to manage leave, from both a qualitative and quantitative stand*
- *Learn from Frisco's unique story of the restructuring of their leave management program, and apply some of their lessons to your own leave management programs*

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Frisco, Texas

- Former small farm town turned upscale North Texas suburb
- Frisco Independent School District (FISD) is the **largest employer** in the city
- Frisco is unique due to its **astonishing growth**
 - *2000-2009, fastest-growing US city*
 - *2014 & 2017, 2nd fastest-growing US city*

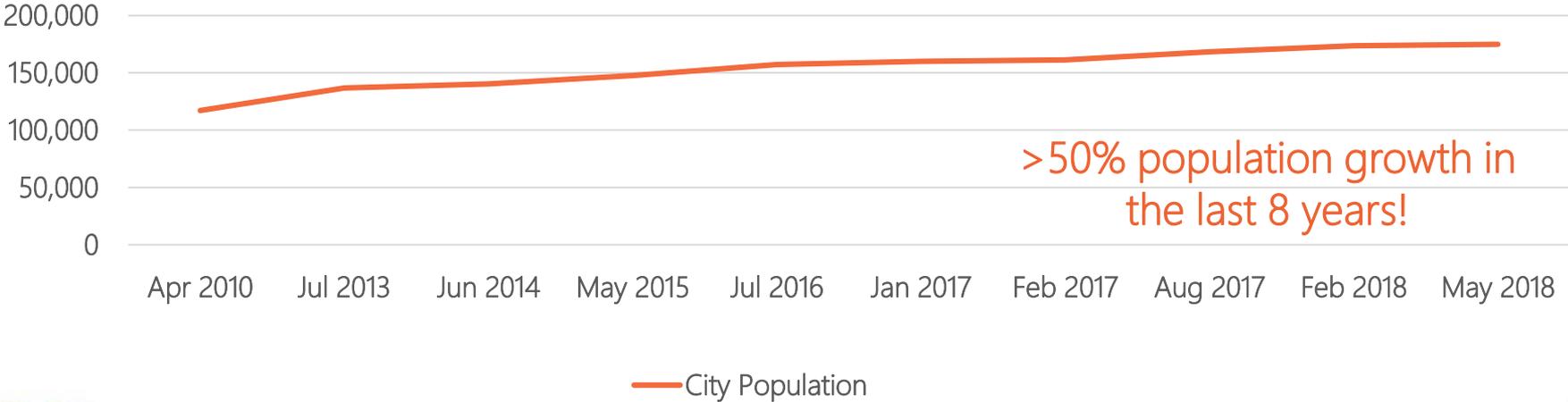


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Frisco, Texas' Growing Population



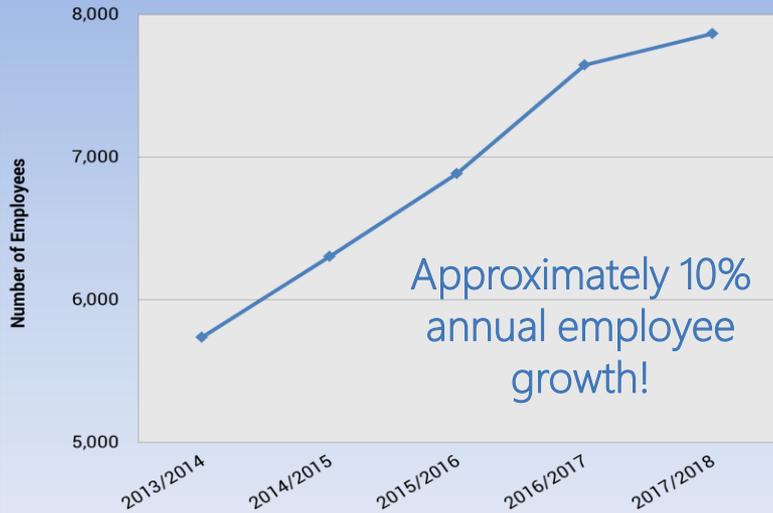
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The Growing Frisco Independent School District



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Frisco ISD Employee Growth



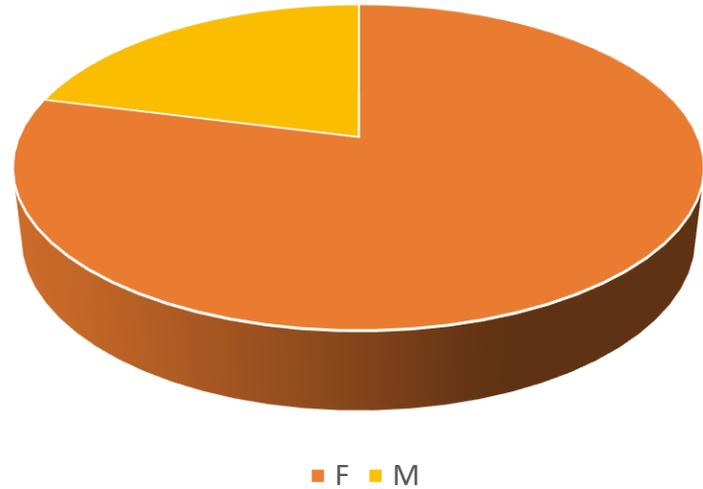
Frisco ISD Student Growth



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FISD Employees Statistics

- 79% Female, 21% Male
- Average Age: 44.5



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FISD's Original Leave Management Program

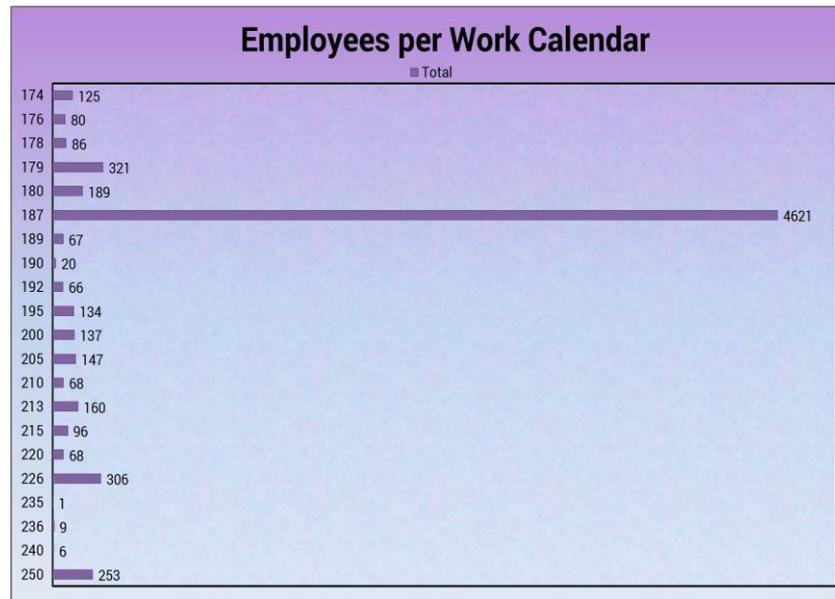
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The Unique Challenges Of Leave Management In A Growing School District

- **Unique Work Schedules:** *26 unique work calendars for the 2018-2019 school year*
- **Large Staff, Multiple Locations:** *42 elementary schools, 17 middle schools, 10 high schools, 3 special campuses, 15 support departments*
- **Above-Average Leave Volume**
- **Constant Addition Of New Employees:** *Average 4 new campuses and 600-800 new employees are hired each year*
- **Every Single Absence → Disruption:** *Almost all absences require substitutes to fill their place for the day missed*

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Team Structure

- Benefits Department has been responsible for all leave processes as of September 2013
- Benefits Department is under the Human Resources jurisdiction
- One staff member dedicates about **80%** of her time to leave management
- One supervisor assists and handles leave exhaustion situations

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Historic Leave Statistics By School Year

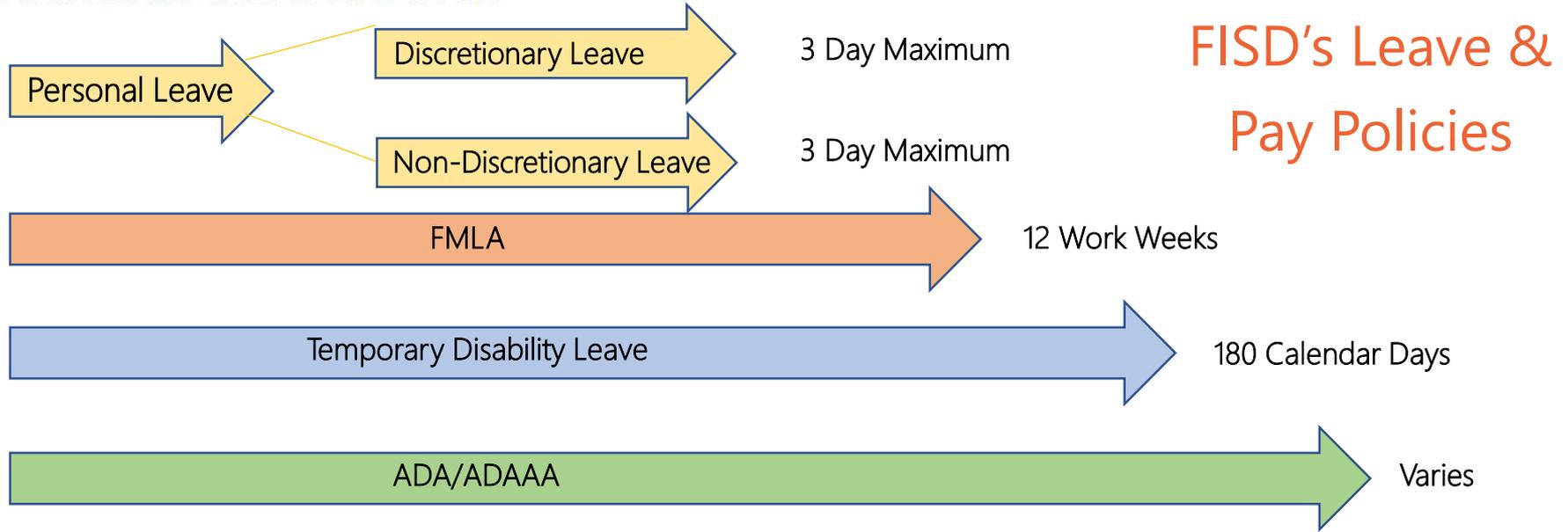


*Benefits Department took over leave management in September 2013

**First full year Benefits Department managed leave

***Software solution implemented in September 2015

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FISD's Leave & Pay Policies

DISABILITY INSURANCE

- Optional enrollment
- Separate from FISD
- Payroll deducted
- LT with ST options
- Employee & vendor claim



LOCAL DAY

- Yearly accrual
- Roll over
- Max accumulation
- 3 day rule



STATE DAY

- Yearly accrual
- Roll over
- No max
- 3 day rule



SICK LEAVE BANK

- Optional
- Membership
- Utilization rules
- Lifetime max



EXTENDED SICK LEAVE COMPENSATION

- By request
- Utilization rules
- 10 day max
- Compensation deducted



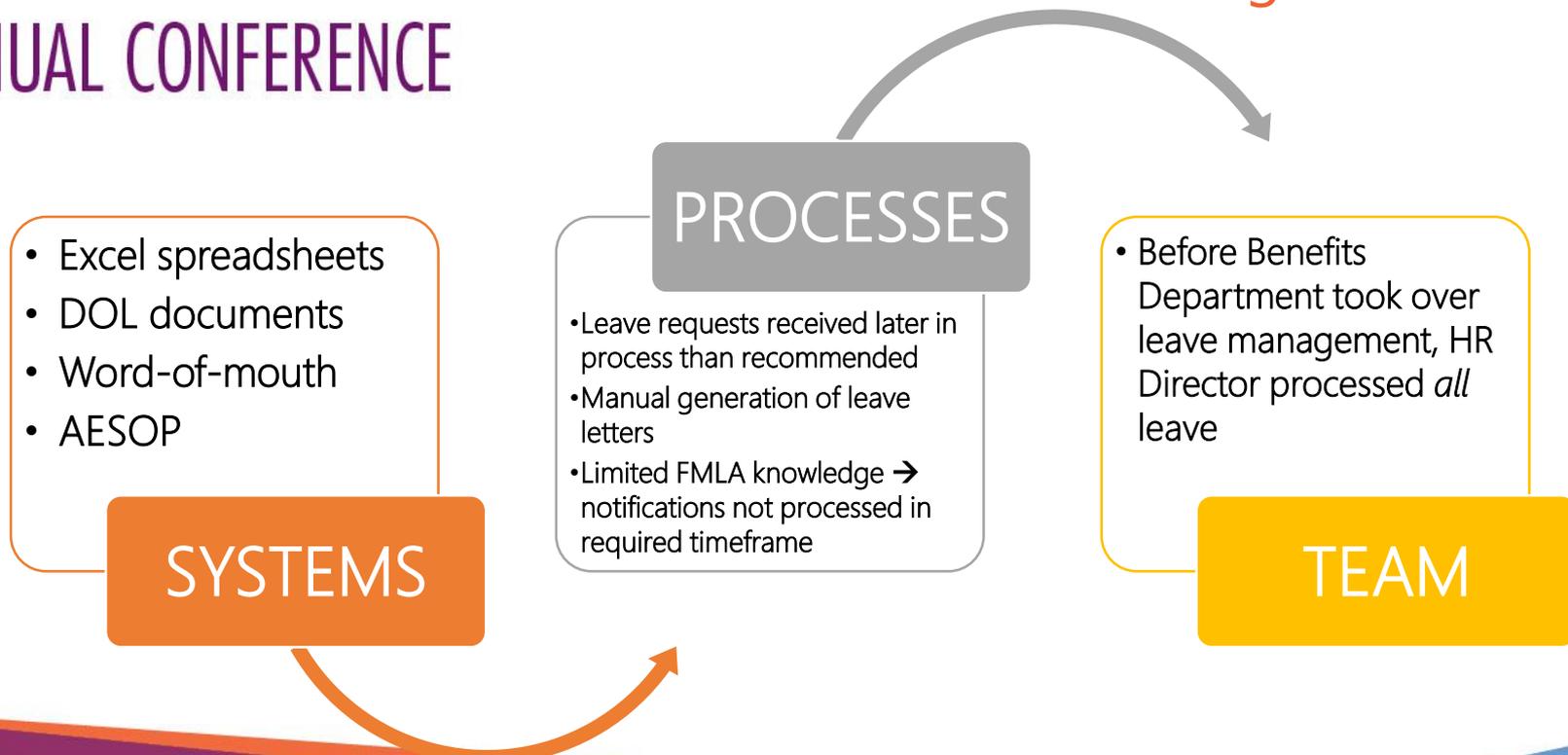
WORKERS' COMPENSATION

- Income benefits (TIBS, Impair, Supplemental, Lifetime)
- Medical bills
- Death & burial

PAID LEAVE RUNS CONCURRENTLY WITH APPROVED FML/TDL

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How Leave *Was* Managed



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District Concerns Drive A Need For Change

Compliance

- Training
- Consistency
- Federal, State, Local, & District Policies

Efficiency

- Coordination/Integration
- Process
- Case Management

Cost

- Overpayment
- Excess of leave
- Time & Communication

Risk & Exposure

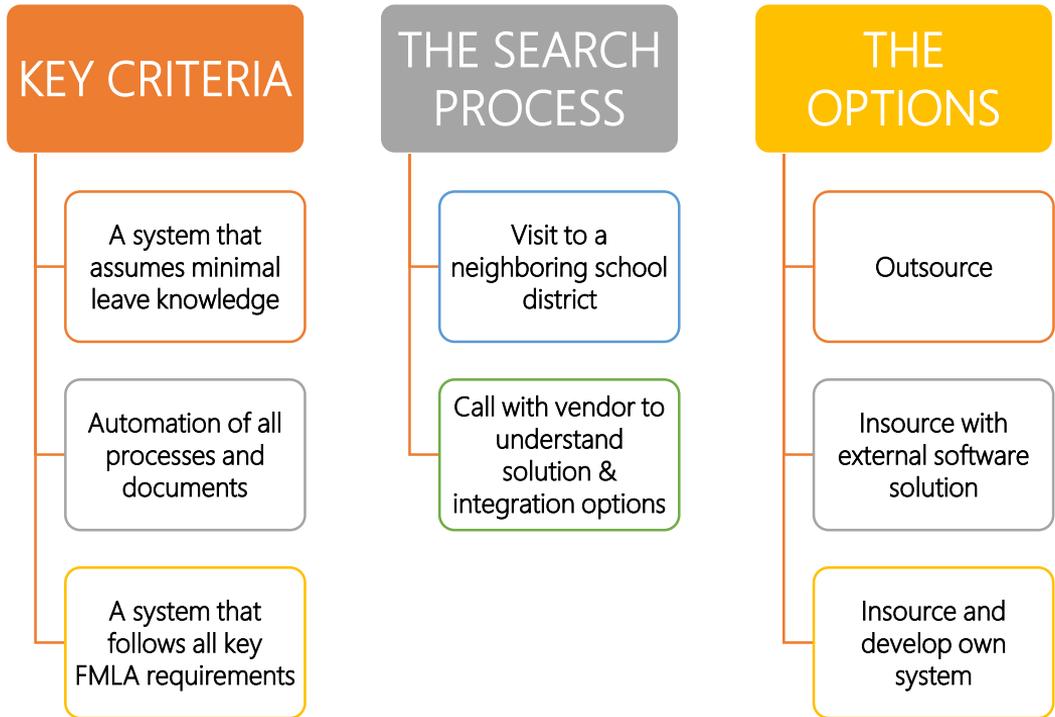
- Lawsuits
- Complaints & Grievances
- Compliance, agreement, follow through

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FISD's Leave Management Program... 2.0!

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The Search For A Solution



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Challenges Of Moving To A Software Solution



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Growing Pains: Challenges Of Moving To A Software Solution

Challenge: Data & Workarounds

- *Risk was a big issue as there were numerous federal requirements potentially not being met*
- *Integration with their own absence system*

Challenge: Lack Of History & Workarounds

- *Limited historical data as leave had been handled by different department*
- *FISD decided to 'start over' when they made the switch to a software system*

Challenge: Changing The Leave Process

- *FISD created new processes from intake, to case management, to RTW*
- *Less is done via mail, and more through email*

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The Solution: Centralization of Data From Chaos...

Absence/Time Tracking Systems

TCP
Time Clock
Plus

Aesop

E-Finance

Finance/HR Management Systems

The
Benefits
HUB

Email

Communication and Document Storage

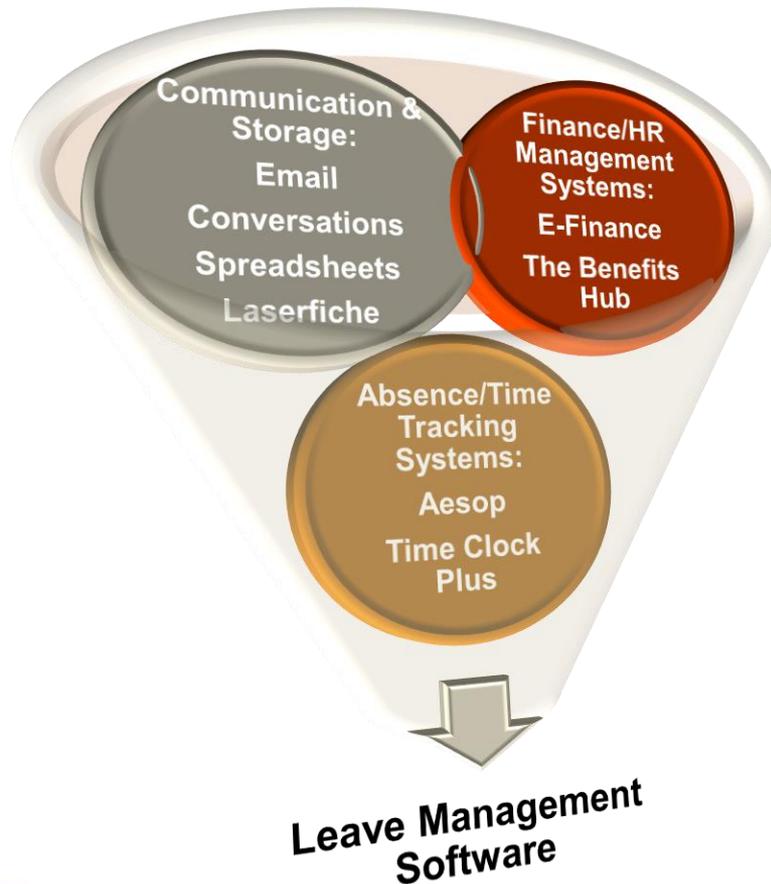
Spreadsheets

Phone Calls &
Conversations

Laserfiche

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... To Compliance!



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Rolling Out The Change

- Benefits Team presented at the “Principal’s Meeting”
- Trained secretaries who enter absence data
- Numerous meetings with participating departments (PR, RM, AESOP manager, TCP implementation staff)
- Benefits Team continuously meets with the highest leave-usage departments (Child Nutrition, Transportation and Custodial Services) to advise the entire department on leave policies and procedures
- Information added to the employee handbook and benefits guide



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The Results

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The Results: Increased Confidence

- Confidence levels have **soared** with the implementation of the system!
- Federal, state and local leave laws all part of implementation, and now part of the leave process
- Vendor continues to monitor all leave law updates, and accordingly updates the software → No law degree necessary in FISD's Benefits Department!



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The Results: ROI → MAJOR Time Savings!

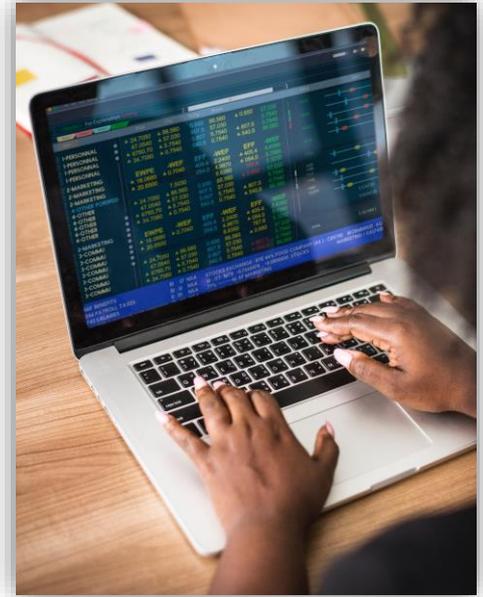
- Auto-generation of leave correspondence and distributed via district email
- Automated intake – easy to process the cases, and the automated workflow creates all necessary next steps and reminders
- No longer need to spend time researching leave laws
- Integration of work calendars and time cards allow for automatic determination of eligibility and entitlement
- Recordkeeping is done automatically, and securely
- Ability to manage 10% annual employee and leave growth



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The Results: ROI → Cost-Savings

- **Leave Exhaustion:** eliminated staff taking leave beyond their entitlement. Notifications to the Benefits Department allows issues to be addressed immediately.
- **Short-Term Disability Claims:** The software's correspondence package includes paperwork to prompt staff to process their claim
- **Return to Work:** Employees returning to work quicker, due to more efficient processes and better communication
- **Collection of Benefit Premiums:** The Benefits Department is able to better stay on track of the collection of benefit premiums, so that the district does not absorb additional costs



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The Results: Improved Compliance

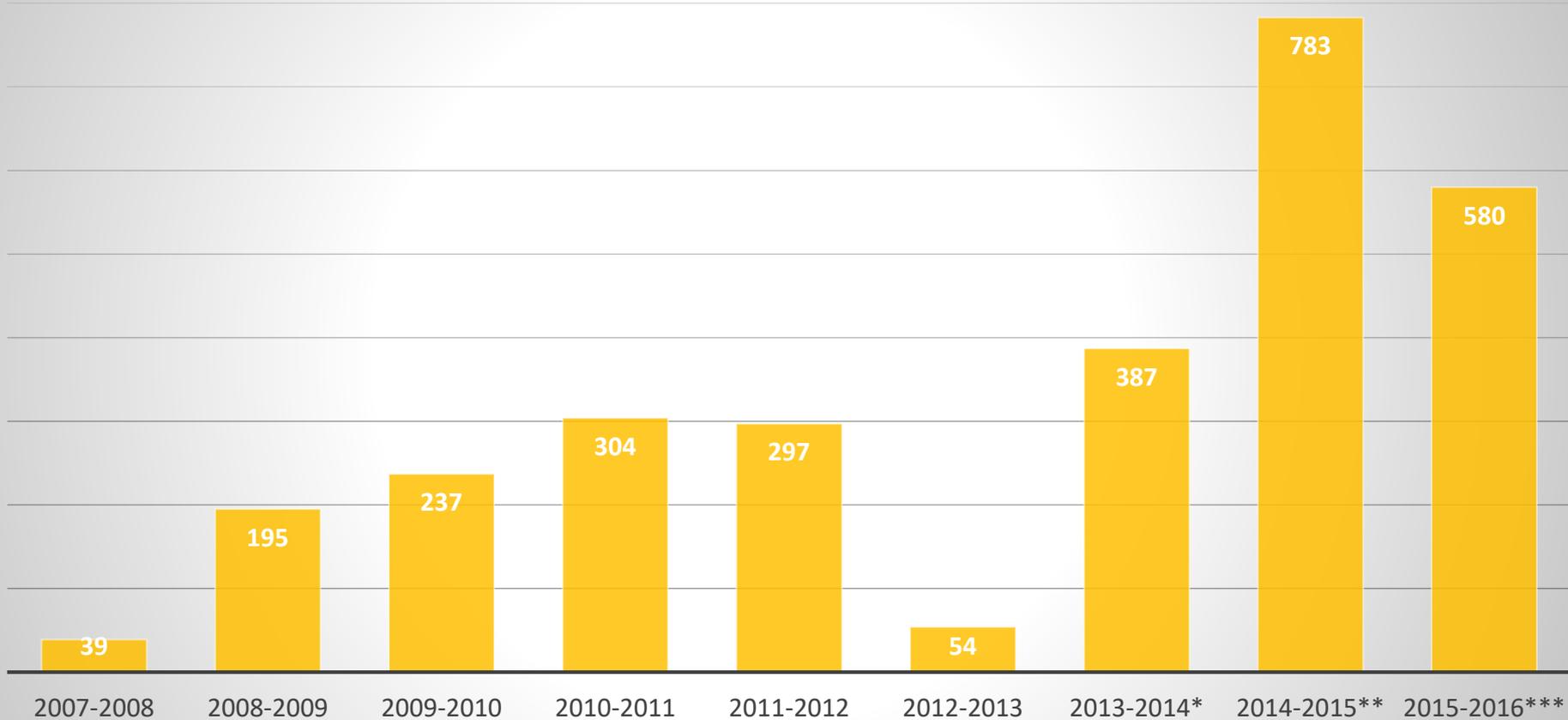
- Processing more cases than ever before – shown right in the system!
- Determined that there were requirements being missed, prior to adopting a software solution
- The volumes being processed, and the amount of policies being managed, proved to the administration that compliance was critical
- No cases slip through the cracks; the moment a request is received it goes into the system where it's securely stored



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The Results... By The Numbers!

LEAVE STATISTICS PRE-IMPLEMENTATION

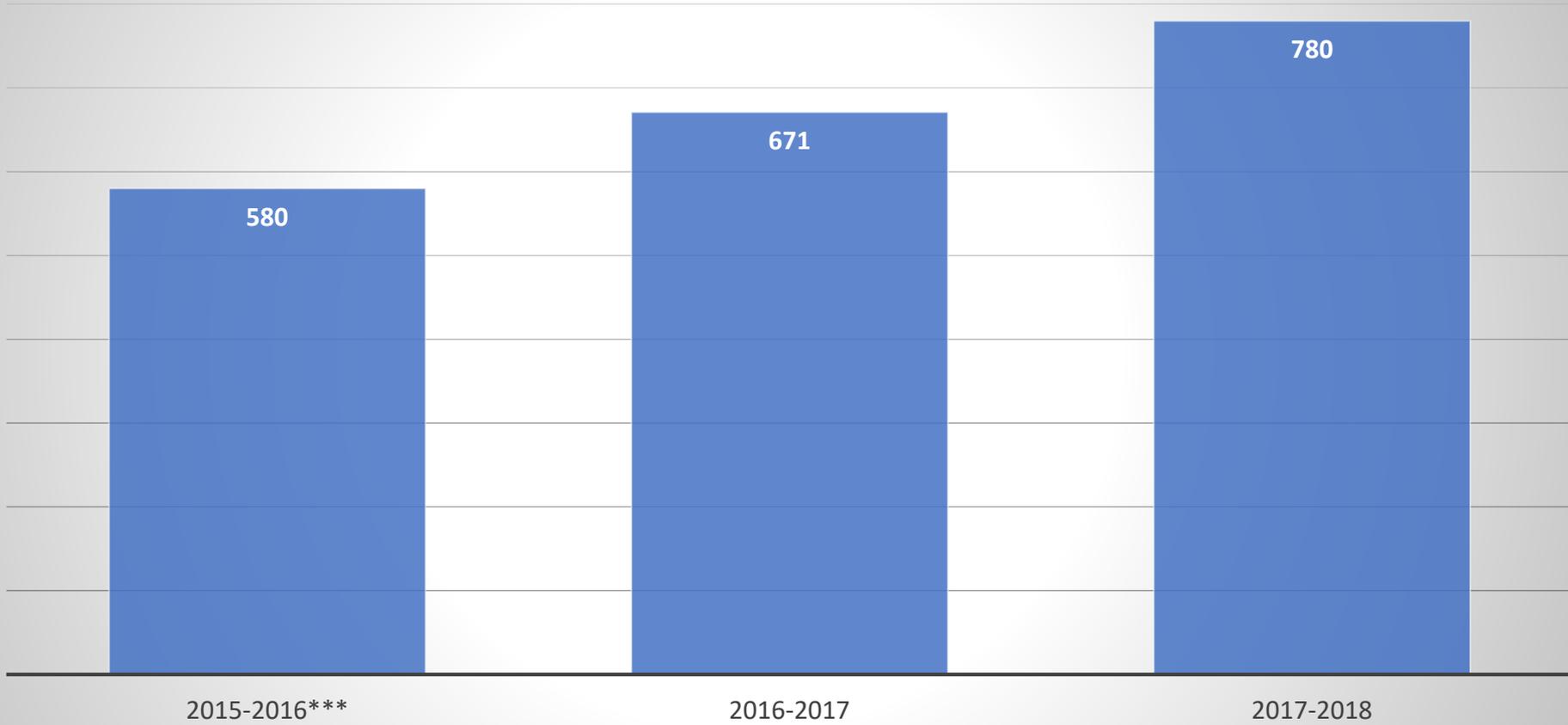


**Benefits Department took over leave management in September 2013*

***First full year Benefits Department managed leave*

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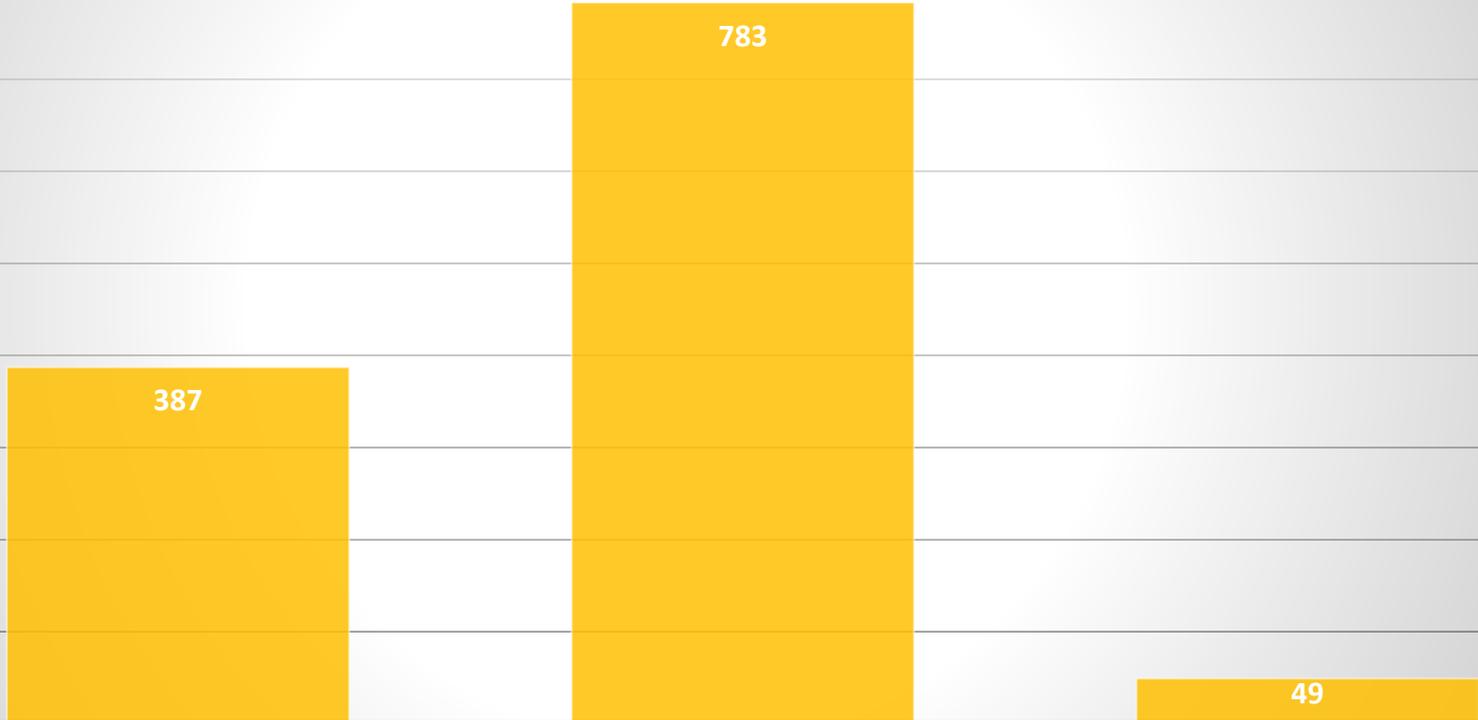
LEAVE STATISTICS POST-IMPLEMENTATION



***Software solution implemented in September 2015

LEAVE CASELOAD PRE-IMPLEMENTATION

Total Case Count



■ Total

2013/2014

2014/2015

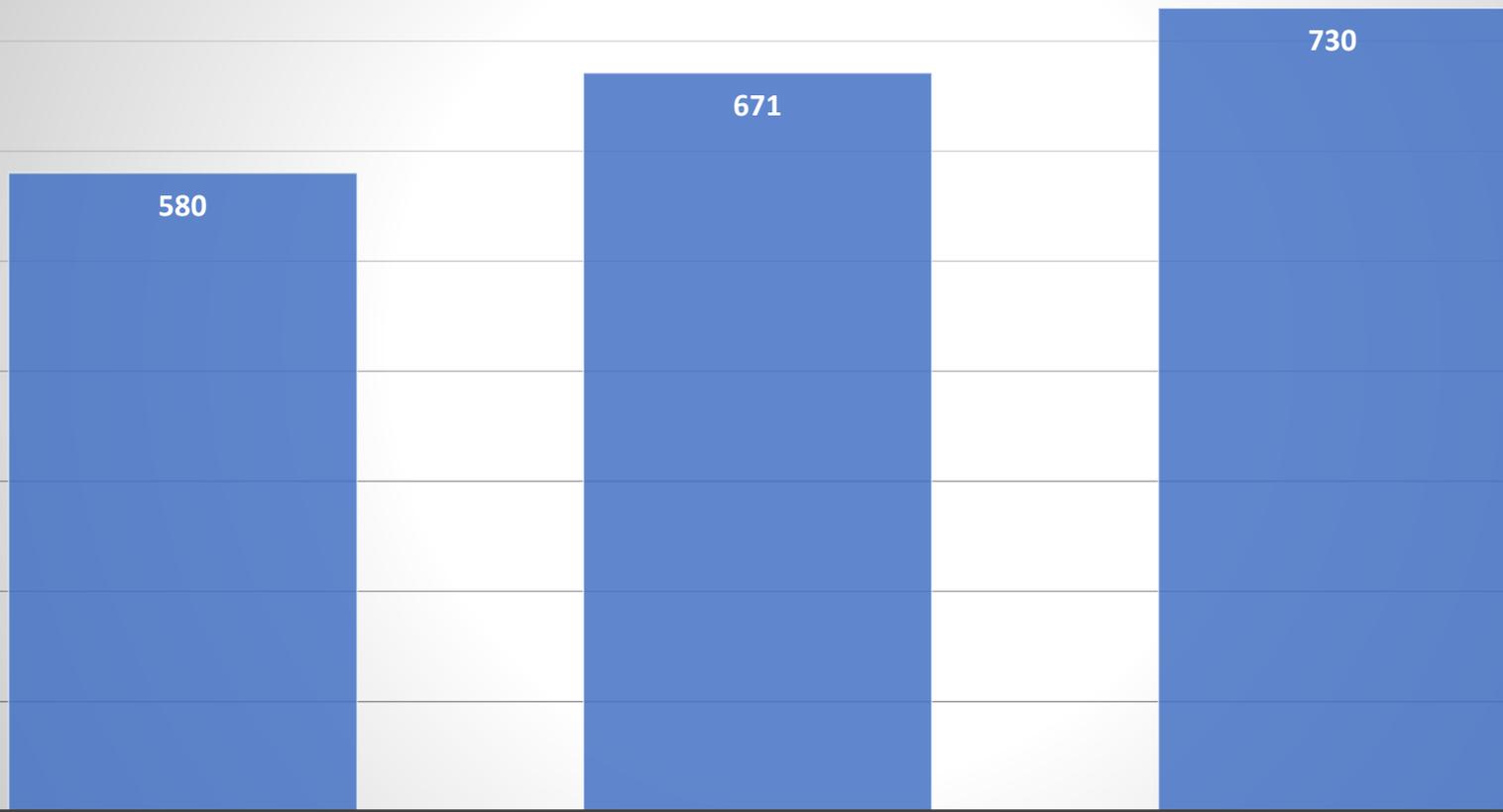
2015/2016

387

783

49

LEAVE CASELOAD POST-IMPLEMENTATION



2015/2016

2016/2017

2017/2018

■ Total

580

671

730

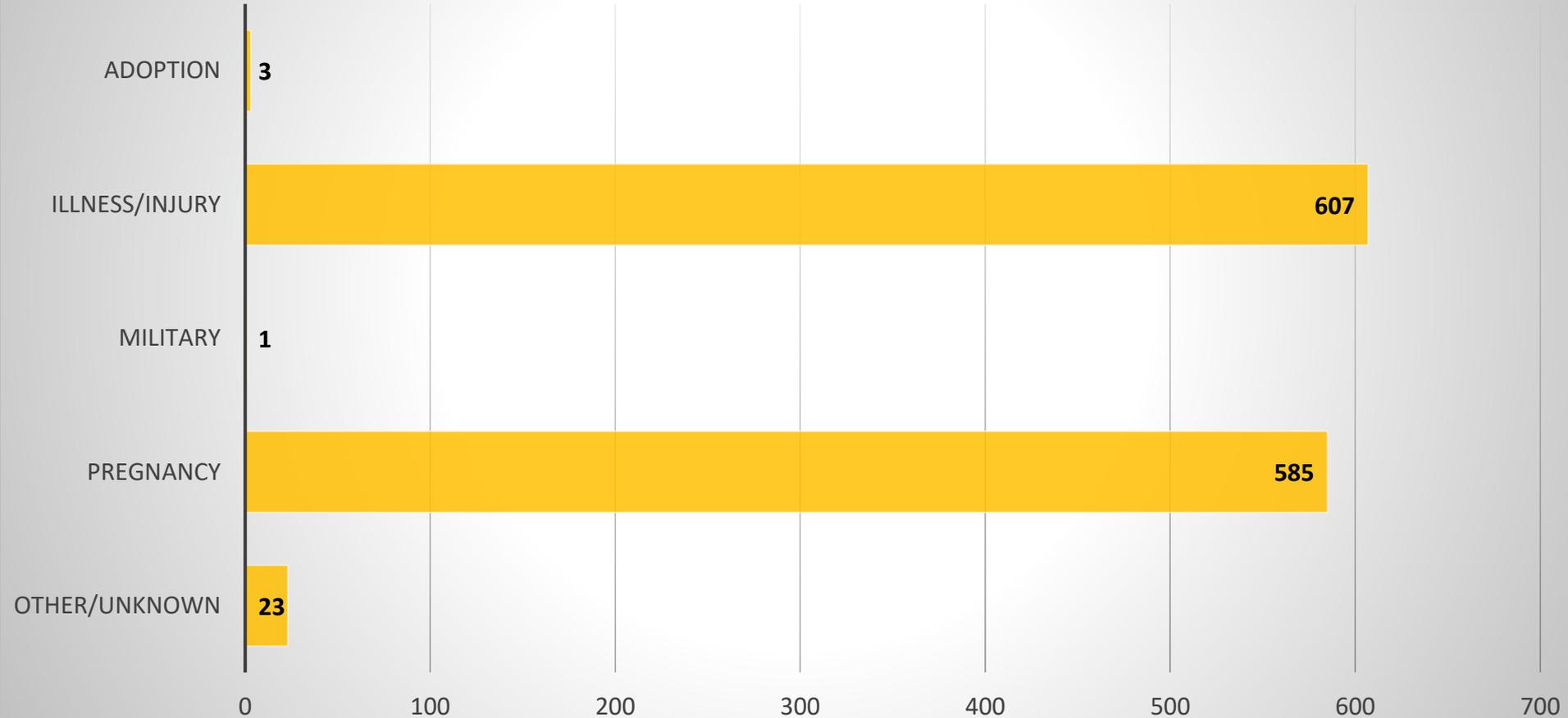
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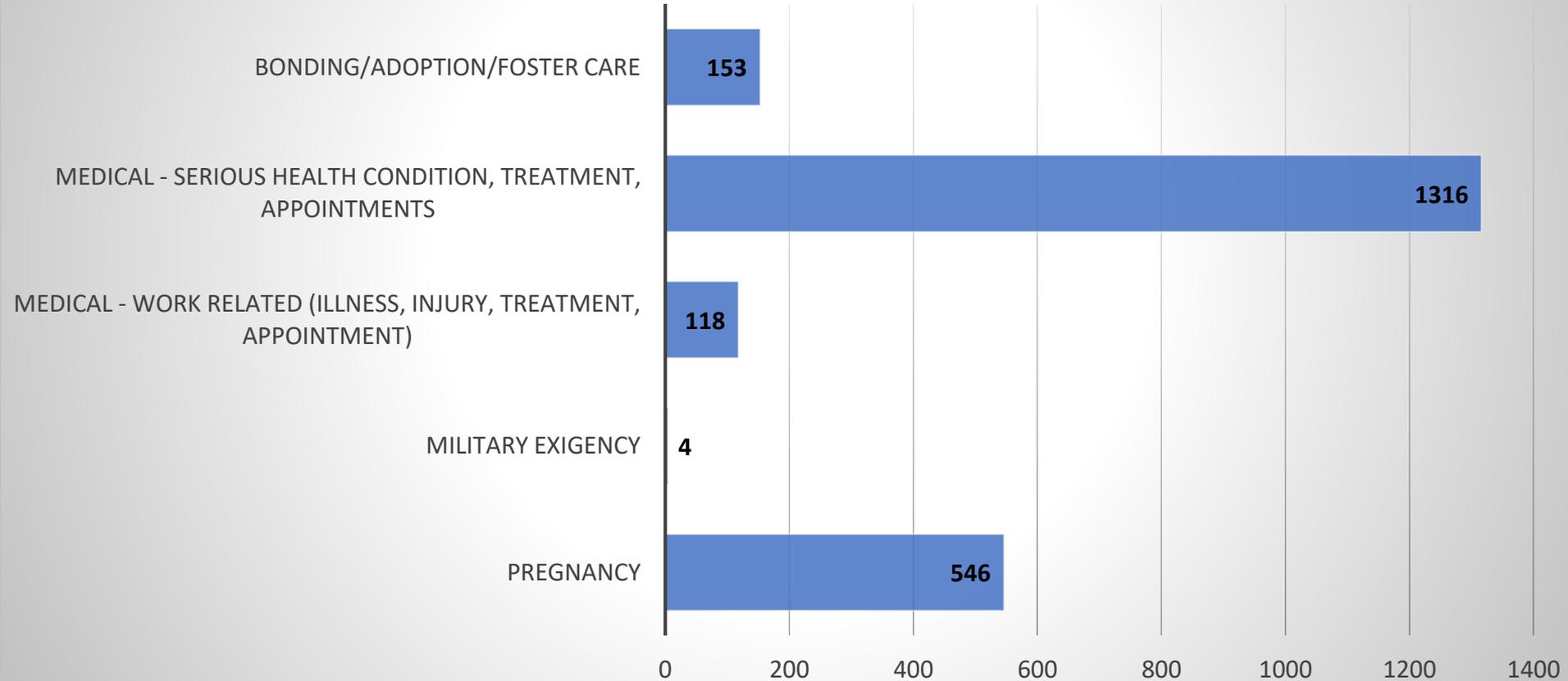
Leave Caseload Analysis

- Steady incline as the population of the district continues to rise, and FIRD processes more leave cases with the system
- Peaks in cases seen at points that correspond to where FIRD was with their leave management program:
 - *Sharp increase in caseload once Brenna and her team took over leave*
 - *Steady incline in cases in line with employee growth*

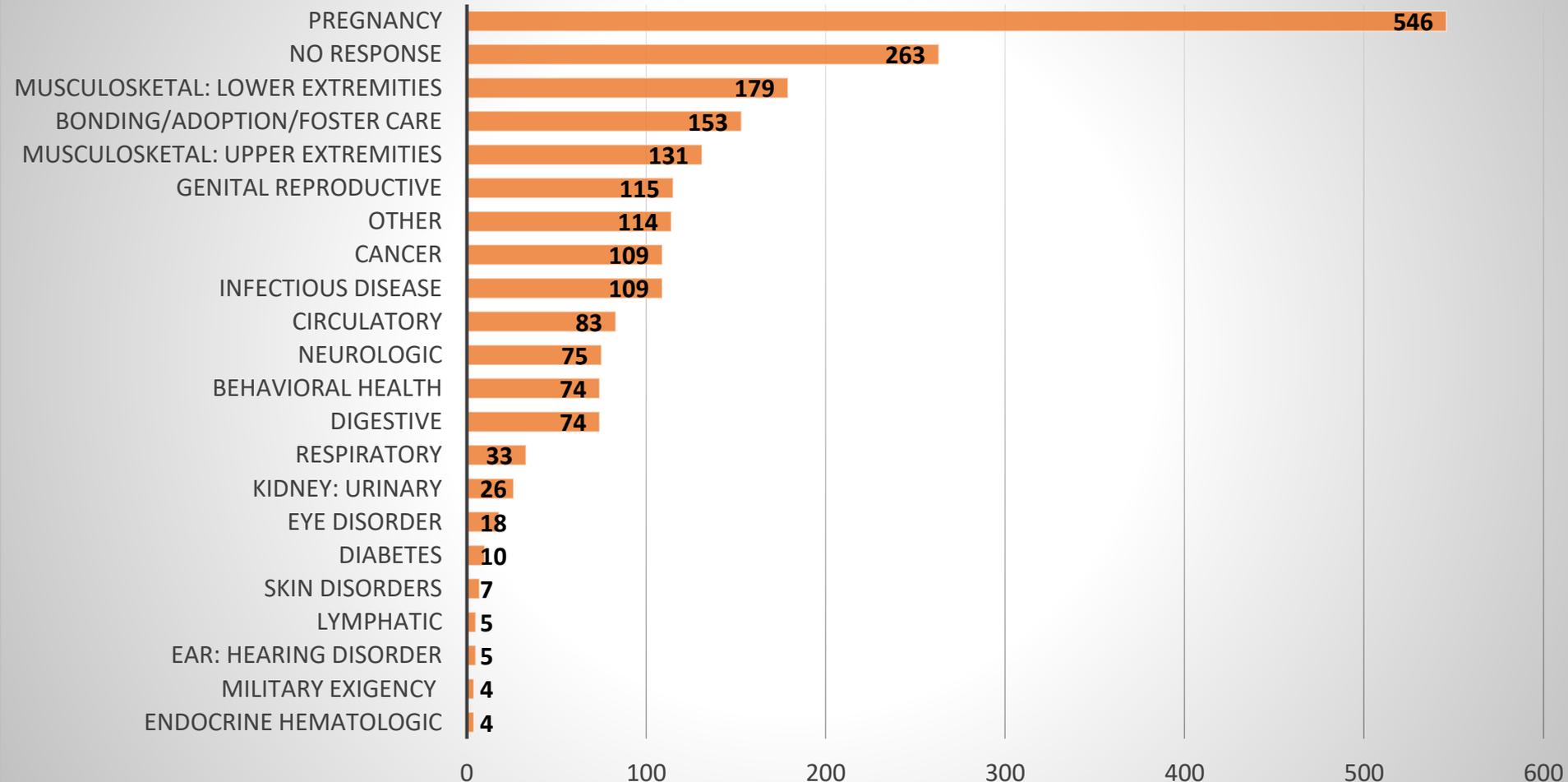
LEAVE REASON PRE-IMPLEMENTATION 2013-2015



LEAVE REASON POST-IMPLEMENTATION 2015-2018



LEAVE BY CONDITION: POST-IMPLEMENTATION

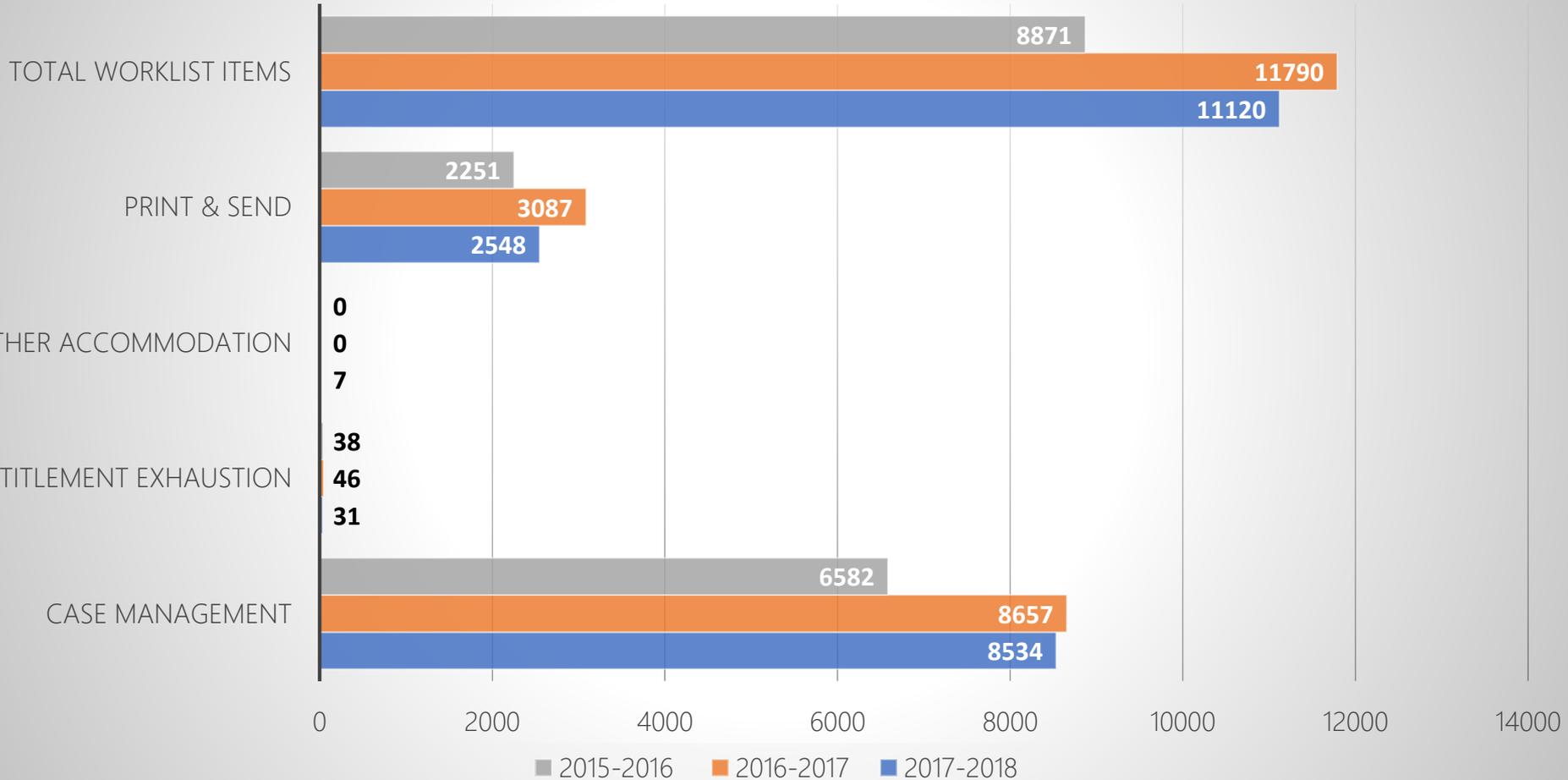


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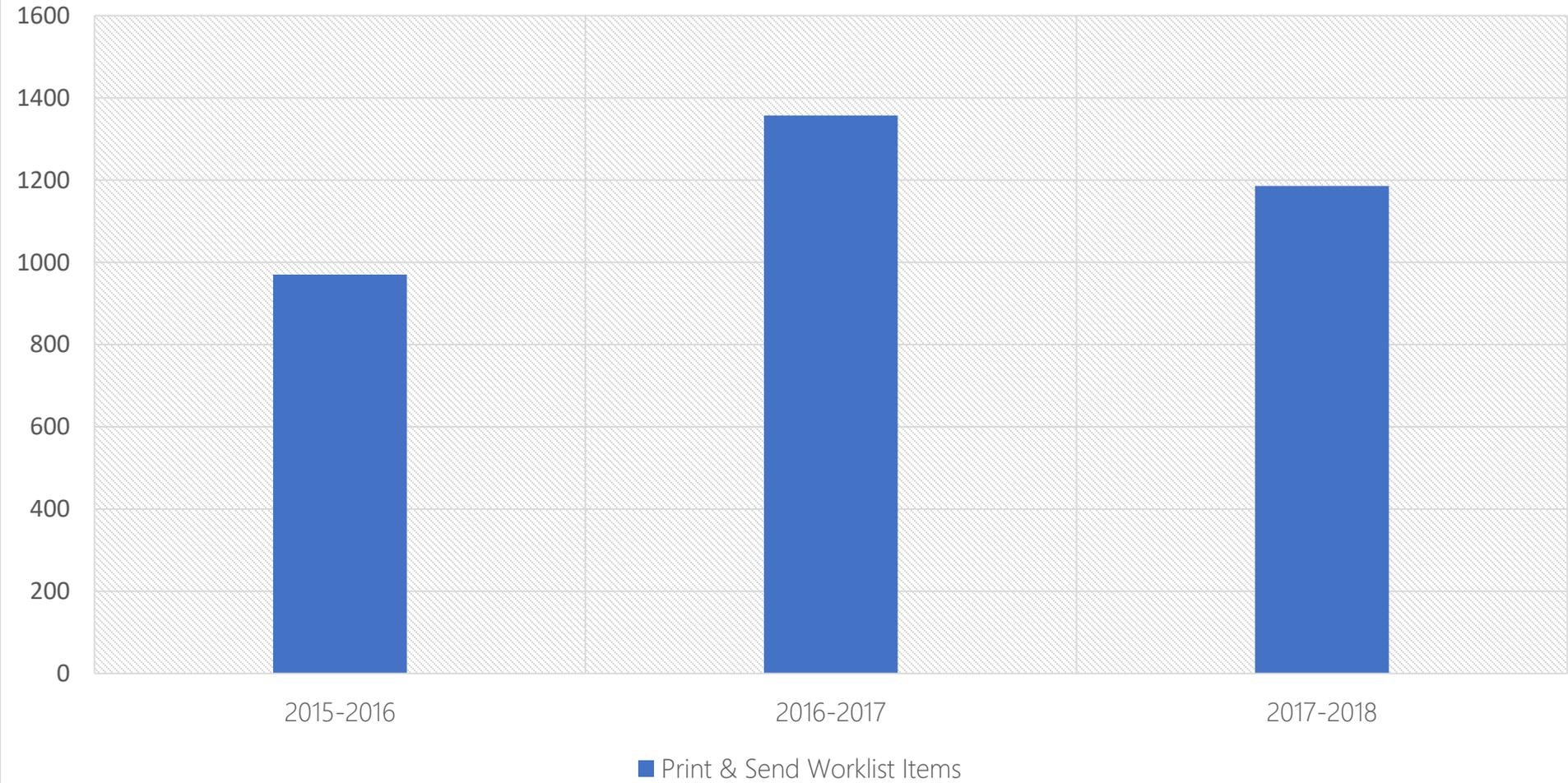
Leave Reason & Condition Analysis

- Increase in data volume & accuracy
 - *When comparing pre and post implementation for leave reason, an increase in specific and accurate information is shown*
- FISD's reporting on the nature of condition allows for the potential to drill down into medical serious health condition cases to discover where there may be concern. This allows us to target interventions more effectively.
 - *Where will medical insurance be more important?*
 - *Where will wellness programs be needed?*

COMPLETED WORKLIST ITEMS POST-IMPLEMENTATION



INITIAL WORKLIST ITEMS – POST IMPLEMENTATION

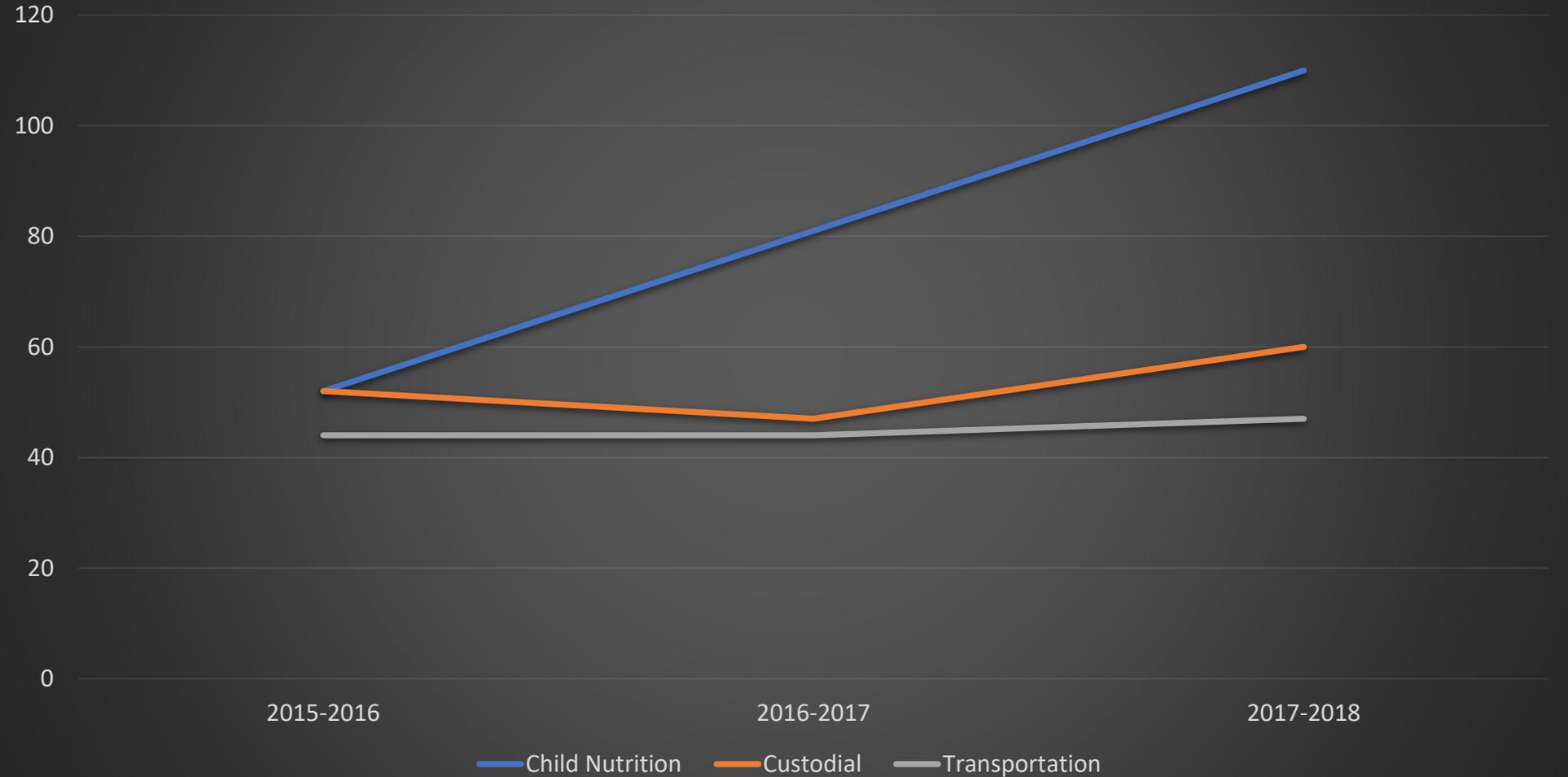


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Worklist Items Analysis

- Increased volume in what FISC can process
- Worklist reports allows FISC to analyze the current workload of their team, and justify hiring new staff members to their team
- Ability to utilize the software's reporting function to discover insights such as the number of initial correspondence packages (including the notice of eligibility) that were sent out
- The large volume of tasks that FISC is able to process with such a small team shows the increasing efficiency of adopting a software

Leave Cases For Highest Leave Volume Departments

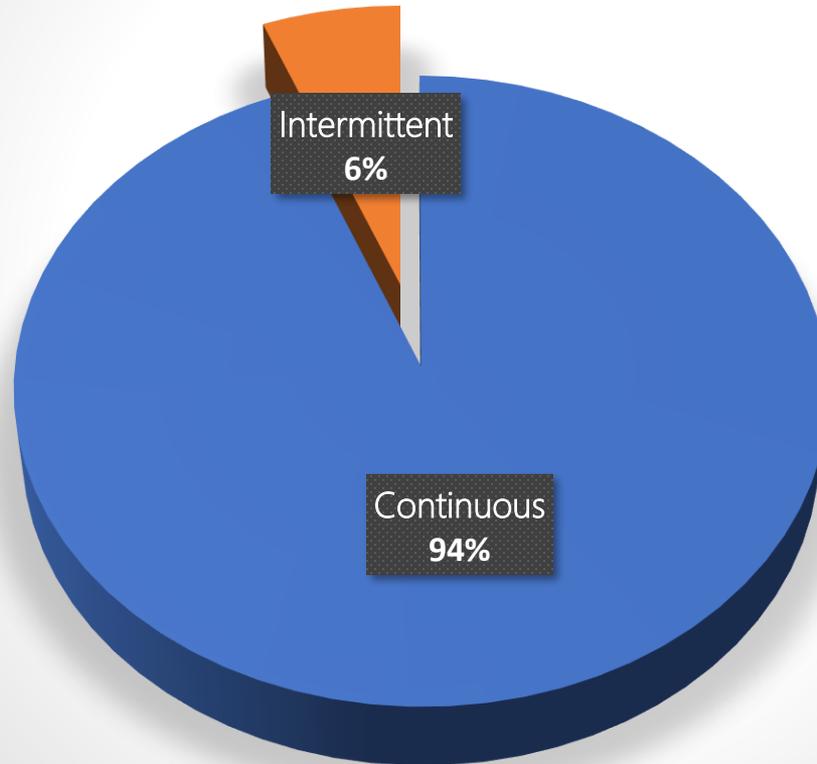


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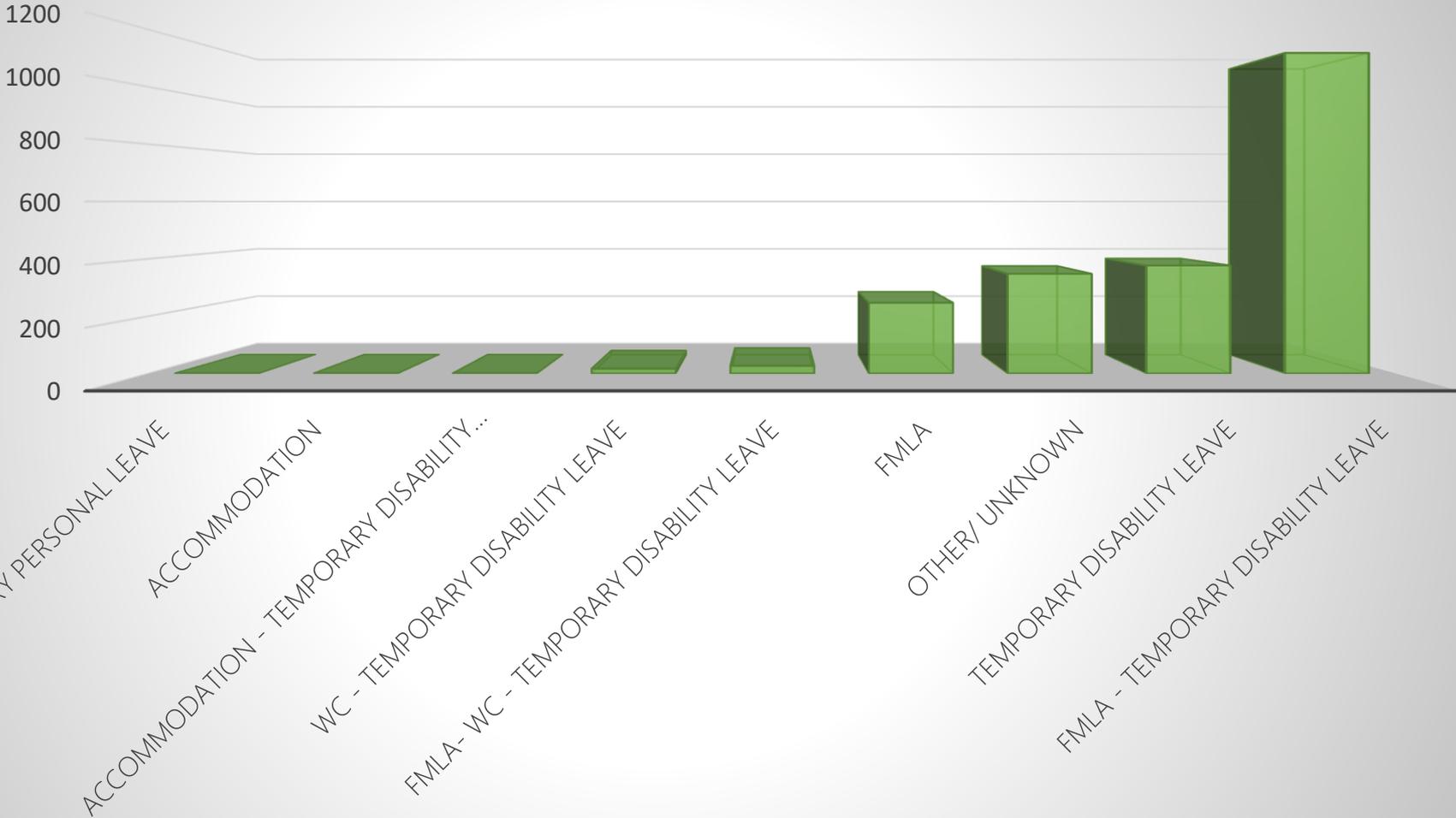
Leave Volume By Department Analysis

- Reporting allows FISD to discover leave volumes based on location, department, and many other variables
- Reports by location showed FISD that their schools all had a relatively equal leave volume
- Reports by location also showed that there were 3 departments that had higher leave volumes, due to the nature of the job and the average employee age for those departments

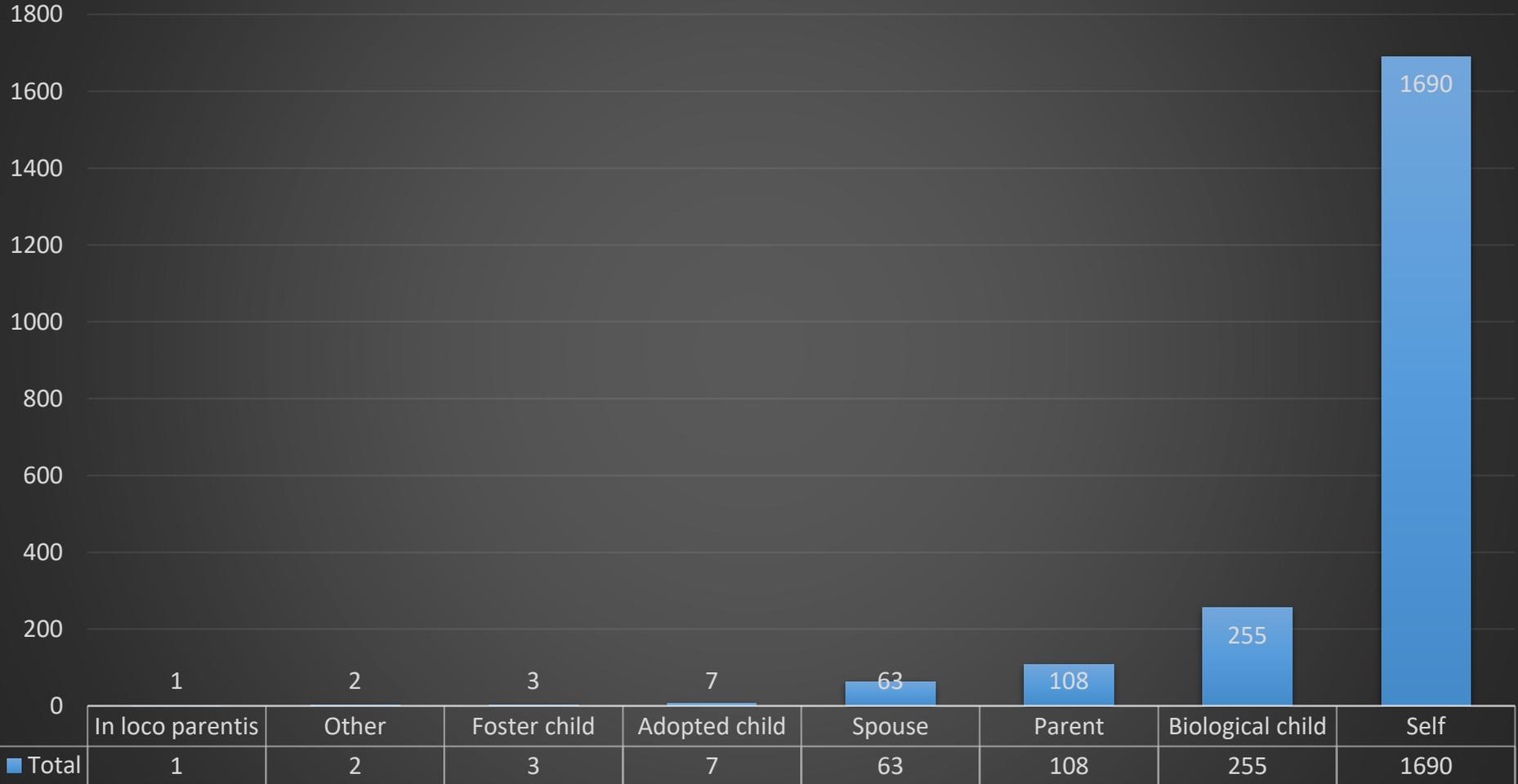
INTERMITTENT VERSUS CONTINUOUS LEAVE POST- IMPLEMENTATION



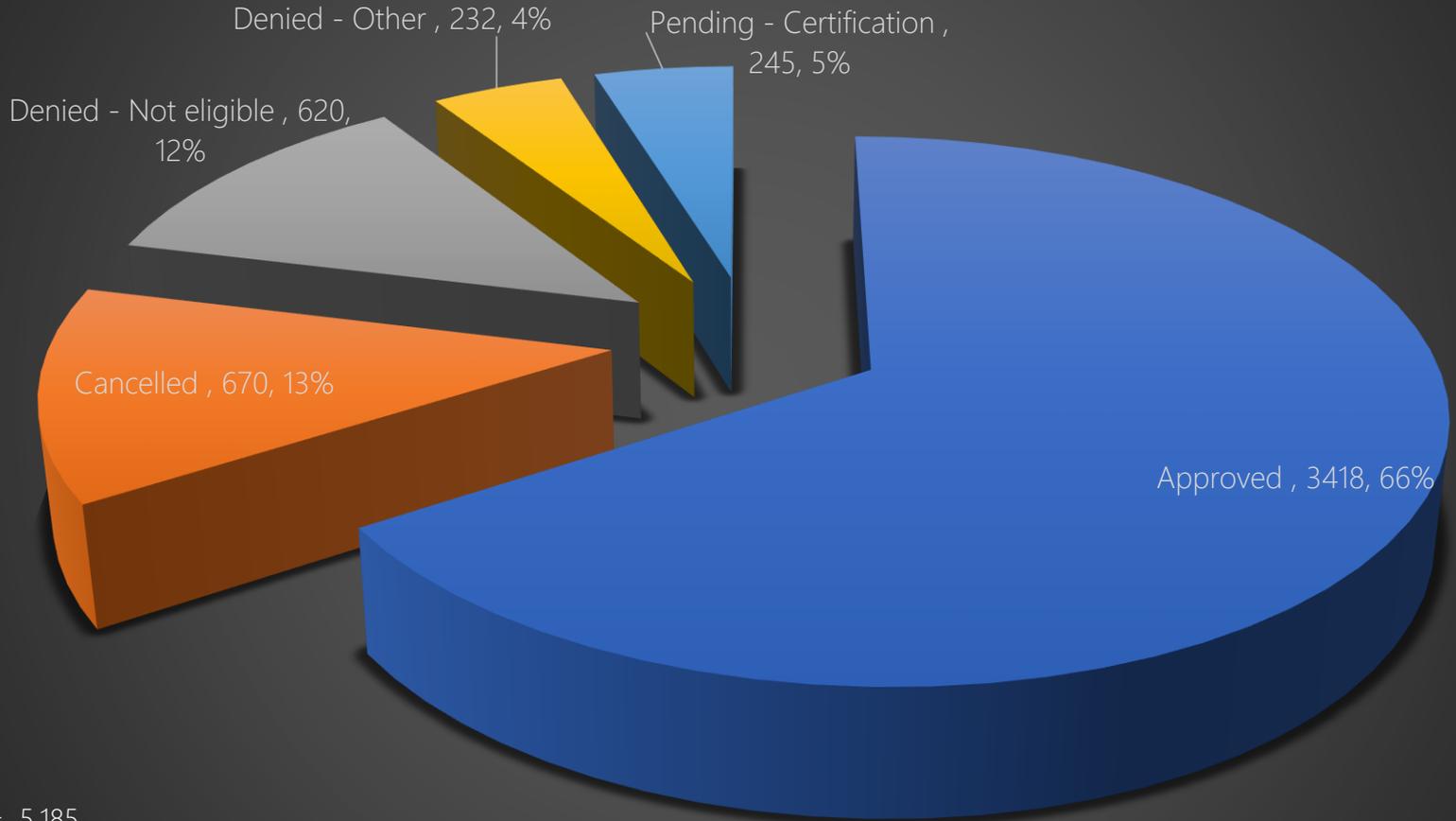
LEAVE BY POLICY POST-IMPLEMENTATION



LEAVE RELATIONSHIP POST-IMPLEMENTATION



MEDICAL CERTIFICATION REVIEW POST-IMPLEMENTATION



3 Year Total = 5,185
*2.42 per case average

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Other Leave Statistics Analysis

- Reporting allows FIRD to drill down on really specific areas, such as finding out if more of their leaves are intermittent or continuous
- A greater variety of policies being managed than ever before
- Medical certification review process demonstrates the number of leaves being approved versus those that are not accepted

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Looking To The Future!

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Recent Enhancements To FISC's Leave Management Program:

- Board of Trustees recently approved a fulltime leave specialist to ensure compliance... Jessica!
 - *The Benefits Team will be looking for a new Benefits Specialist as Jessica transitions to being the Leave Specialist*
- Hope to eventually allow self-service for staff to request leave online

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Looking To The Future: FISD's Goals

TRAINING

- Supervisor vs. Employee
- "What to expect when your..."

INTAKE

- Informal → Formal
- Electronic form

REPORTING & ANALYTICS

- Maximize leave team efficiency
- "Why" and "So what now"

COMMUNICATION

- Strengthen notifications
- ESL

IDAM

- Single intake source
- Integrate Occ & Non-Occ

ACCOMMODATIONS

- Establish guidelines
- Utilize software

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Thank You!
Any Questions?