We Are in Our PTO Era (Leonardville's Version)

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My project entails taking the paper and pencil method of accrual and awarding of sick leave and vacation to an electronic method within payroll. Within that project we combined the two into PTO. It has been a learning experience as well as a transition time as some staff had lots of sick leave built up and instead of converting it to PTO, we put it in a bank for them to use as we don't pay out sick leave when someone leaves, only vacation. As the months and years go on, this will be easier for new staff to feel like they can take time off with approval before a year and the long-term employees to be thankful for how it accrues.

As this first year of rollout goes, we are grandfathering those with large PTO amounts to not lose them at anniversaries because they didn't have time some of them to use their excess down. We are still floating the idea of cashing it in with the board. They are open to it, but finances come in to play of when and how much.

Staff are thrilled that they are accruing PTO and able to use it faster than our previous method which just granted X number of hours after you worked 1 year. We have changed it to accrue from day 1 and use it after 90 days. They are also able to see it on the app and on their checks. Previously, they had to come to the office, and they felt it wasn't very open and transparent and or had to wait a week to find out their totals, which made the staff suspicious. This change was influenced by that feeling from the staff and the change in personnel in the office to be able to do it. The new office manager and I have worked hard to make sure that everything we do in this process is transparent to the staff. Doing so enables us to gain more trust from the staff. It helps that my office manager loves spreadsheets and is willing to figure these things out, so I didn't have to do all the work.

Stumbling blocks and turning points as we have progressed through this project have been met with a can-do attitude between my office manager and myself. One of the biggest hurdles was deciding with the board how to combine yet do away with the sick leave. Then the accrual methodology and getting it into the system after we tweaked all the parameters and accruals. Now we are changing HR systems in part due to this action learning project and our need for a program that better suits our needs.