

## American Federation of Teachers

[www.aft.org](http://www.aft.org)



### At A Glance:

- **Company:** 1.4 million member union that represents the economic, social and professional interests of classroom teachers.
- **OpenAir Users:** 350
- **Industry:** Government
- **Location:** Washington, D.C.
- **Challenges:**
  - U.S. national union had difficulty conforming to contract regulations.
  - Manual processes produced errors and additional overhead.
  - Disjointed departments lacked communication.
- **Results with OpenAir:**
  - Savings. Eliminates at least a days worth of data entry and reconciliation overhead.
  - Efficiency. OpenAir reduced expense reimbursement cycle from 2 weeks to 2 days.
  - Simplification. Integrations streamline data exchange and manual processes.
  - Satisfaction. Staff is genuinely pleased with improvements made by OpenAir.

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— *Kim Harkness-Jerome, Accounting Manager*  
*American Federation of Teachers*

### Results

OpenAir enables the AFT to simplify their business and meet contract requirements. “Through our evaluation it was clear that OpenAir was on the right track in terms of their business model and level of commitment to customer service,” said Harkness-Jerome.

In AFT’s previous paper dependent system, expense reimbursement could take up to two weeks to process for their staff members who work out in the field in remote offices.

Now with OpenAir, expenses submitted with scanned receipts over the weekend are approved, processed and in the bank by direct deposit by Tuesday or Wednesday. “I was at a company event and actually had the husband of one of our employees come up and shake my hand,” said Harkness-Jerome. “He was genuinely grateful that his wife’s expense reports now had such a quick turnaround.”

With OpenAir integrations, expenses and timesheet entries pass through directly to the projects module of OpenAir, eliminating double entry of time and manual errors. The staff has also been pleasantly surprised at the ease of invoicing grants within OpenAir.

OpenAir’s reports and integration with the payroll system have also saved at least a day’s worth of data entry and reconciling. “OpenAir has quickly and efficiently proven its worth,” said Harkness-Jerome. “We have eliminated many days of overhead and the system has proven that it is worth its weight in gold.”

### The Challenges

The inner structure of AFT (National Union) has unions within the union. The secretarial and administration staffs both belong to their own unions.

Per the terms of the administrative contract, the staff required an online system to record their time, expenses and work on grants. To meet these requirements, the AFT needed to bring in an online PSA solution.

Prior to OpenAir, expense reimbursement and timesheet tracking at AFT were handled by two separate departments. Furthermore, leave accrual was managed with multiple disconnected software systems.

 **Find out more: contact OpenAir at 1.888.367.1715 or visit [www.openair.com](http://www.openair.com)**





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With little communication between the two, reconciliation and information sharing was impossible. “Unlike most businesses, our leave was recorded on expense reports, not timesheets,” said Kim Harkness-Jerome, Accounting Manager at AFT.

“One of the main areas we wanted to improve was our data exchange between systems and departments. Much of the confusion surrounding our leave tracking was due to the manual process of providing the data to our Human Resources department.”

The AFT also had a special requirement that expense reports and activity reports (timesheets) be submitted at the same time. This was difficult to enforce given that multiple departments were involved.

In addition, some staff members were required to submit activity reports plus an additional timesheet when working on grants.

Managing multiple Federal grants within an antiquated system causes headaches and confusion. Prior to OpenAir, AFT processed their grants through QuickBooks but with serious limitations.

“For every new grant we received, a new session of QuickBooks was required. This caused a real problem since we couldn’t combine all grant activity and timesheets into one system.” Furthermore, the AFT’s old system required multiple levels of data entry.

## The Solution

Operating as a union carries with it a plethora of rules and regulations that impact virtually every aspect of business. Control is the name of the game and without it, these regulations can become burdensome and impossible to follow. OpenAir provides the AFT with the necessary tools to remain in control of their union mandated business processes.

The AFT has a special annual audit for “agency fee” to determine how much of their dues can be charged for collective bargaining services provided to nonmembers. This audit requires that a timesheet must be submitted before an expense report may be filed.

“Our union guidelines stipulate that managers aren’t allowed to view their reports’ timesheets. With one department collecting and entering time for audit purposes and another handling expense reports, there was little communication which lead to employees entering expenses without a submitted timesheet.”

With OpenAir, this is no longer a problem as specific functionality was developed to prevent expense submission if a timesheet for the same time period did not exist.

OpenAir also helps the AFT tackle unique leave accrual rules. The employer is required to report weekend days worked and award compensation days when an employee works sixteen consecutive days. A series of OpenAir reports allows the organization to track which employees are eligible for these extra leave days.

Now that the AFT has one system recording all employee leave and grant activity, the organization has more flexibility. “In the near future, we plan to roll out the ability for our employees to directly view their leave balances via a link to the HR system.”

OpenAir’s robust integration capabilities will also be an important consideration as AFT considers an update of their accounting system. “We have already had great success with our current integrations and look forward to further automating our business processes.”

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