# HR Trends Roundtable

October 20, 2022

9AM - 10:30AM

KIWI PARTNERS

Arabella Advisors

TriNet

First Republic
It's a privilege to serve you®



# Agenda

- Introduction
- Great Reshuffle – War for Talent
- Bring Your Whole Self To Work
- Employee & Employer Values Alignment
- HR Tech and PEOs (TriNet)

# Meet The HR Services Team



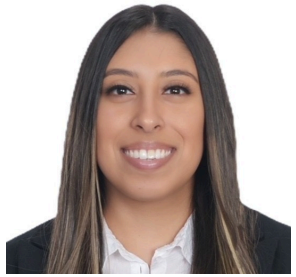














# Great Reshuffle: War for talent



**44%**
of employees are "job seekers"

- Attraction & retention
- The future is hybrid
- Flexible work arrangements
  - Shorter weeks, arrangements based on role needs
- Employee mobility
  - Multi-state compliance

Source: Willis Towers Watson's 2022 Global Benefits Attitudes Survey

# **Great Reshuffle: War for Talent**
## Breakout Session

5 minutes to discuss the following question:

What can an organization do to succeed at attracting and retaining talent in this current environment?

# Bring Your Whole Self to Work

**79%**
work-related stress

**60%**
(3 out of 5)
- Lack of interest
- Lack of motivation
- Low energy at work

- Mental health support
- Wellness initiatives
- Manager-employee relationship



Source: The American Psychological Association's

# **Bring Your Whole Self to Work**
## Breakout Session

5 minutes to discuss following questions:

How can managers get to know employees individually and show appreciation for their unique contributions?

# Employee & Employer Values Alignment

**56%** **of workers**
wouldn't consider a job at a company that didn't agree with their values

- Employers' involvement in societal & political debates
- Quiet quitting

| From | To |
| --- | --- |
| **D**iversity | **J**ustice |
| **E**quity | **E**quity |
| **I**nclusion | **D**iversity |
| | **I**nclusion |

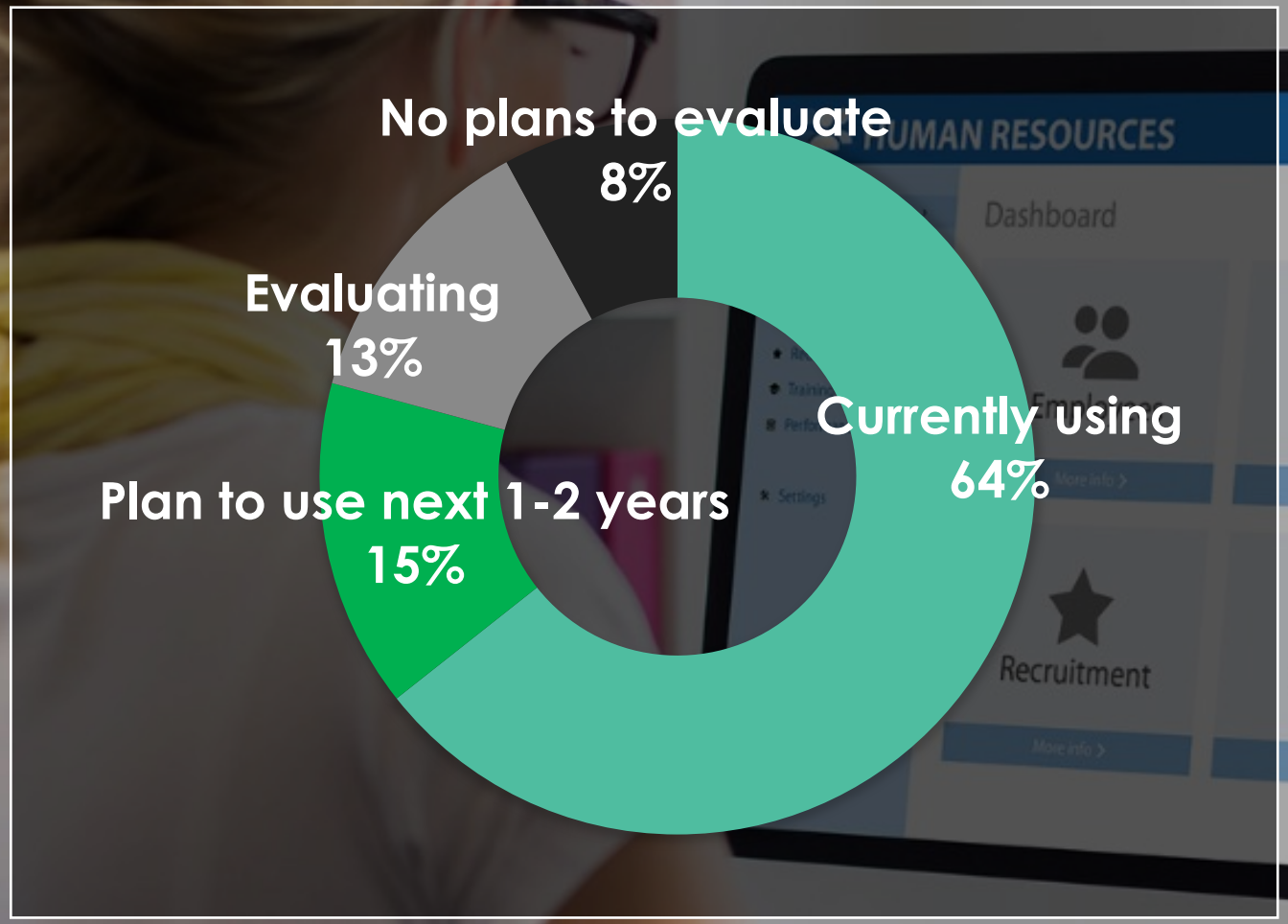
Source: Qualtrics, 2022

# **Employee & Employer Values Alignment**
## Breakout Session

5 minutes to discuss following question:

How are you engaging with employees in co-creating an understanding of your organization's purpose?

# HR Technology




- Workforce analytics
- Automation
- PEOs

Source: Capterra

# Connect with us!

@kiwipartners

http://www.linkedin.com/company/kiwi-partners-inc-




Diana Gallardo

J.D. SPHR, SHRM-SCP

SVP of HR Services

dgallardo@kiwipartners.com





Solana Cederboim

MSHR, SPHR

VP of HR Services

scederboim@kiwipartners.com


## Subscribe to our Blog

Receive insights on topics such as DEI, compliance, compensation, benefits, recruitment, & more!

Scan QR code or subscribe via link: bit.ly/3jgtf1q



# Professional Employer Organizations

## "How Does My NonProfit Organization Benefit from a PEO? "


**John Littler**
National Director CPA Alliances

Ardelle Stoute
Senior Sales Consultant NonProfit

Michele Pasquale
Senior Sales Consultant Professional Services


Incredible HR


© 2022 TriNet Group, Inc. All rights reserved. All trademarks, trade names, service marks and logos referenced herein belong to their respective companies.
Reproduction or distribution in whole or part without express written permission is prohibited.

# AGENDA

KIWI PARTNERS

- Who is TriNet
- What is a PEO – Professional Employer Organization
- How we work with Kiwi Partners
- Technology
- Integrations
- Trendspotting NonProfits working with PEO's
- Return on Investment
- Questions

Arabella Advisors

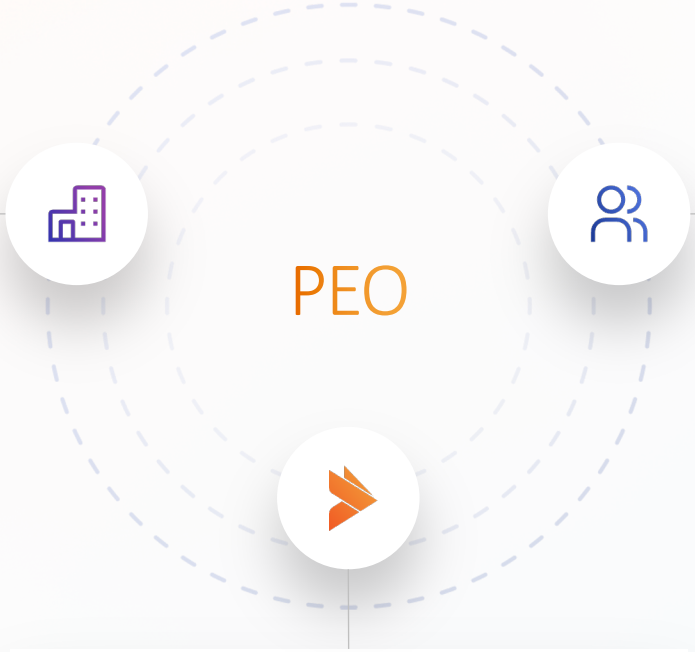
First Republic Bank
It's a privilege to serve you℠

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# A PEO Solution so you can focus on your business

## Your Employees

- Access to comprehensive and cost-effective benefits
- Discounts and perks
- Self-service platform and mobile app




## Your Company

- Manages organization and employees
- Drives business decisions
- Focuses on company growth

## TriNet

- Sponsor benefit plans
- Payroll and payroll taxes
- Support compliance

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# PEOs by the numbers

According to research published in September 2019 by the National Association of Professional Employer Organizations.

**27%**

Annual return on investment1[1]

**$1,775**

Average cost savings per year per employee[1]

**~20%**

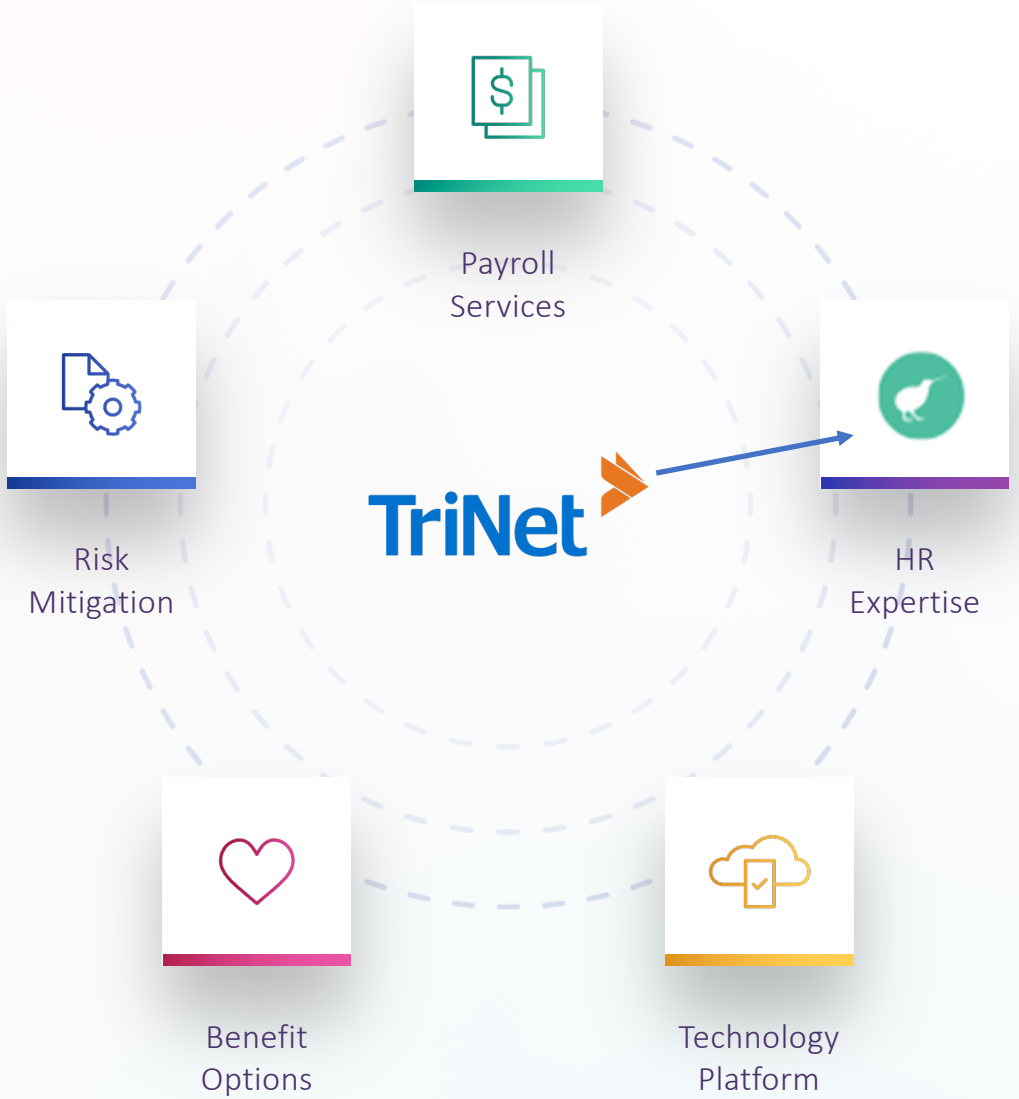
Reduction in employee turnover[1]

[1] https://www.napeo.org/docs/default-source/white-papers/white-paper-7-the-roi-of-using-a-peo.pdf?sfvrsn=f5c534d4_2 (accessed 12/29/20)

Individual business results may vary, and this ROI percentage may not reflect your experience with any particular PEO, Including TriNet.

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# A PEO Solution
## so you can focus on your business




TriNet © 2022 TriNet Group, Inc. All rights reserved.

# A Partnership Solution
# so you can focus on your business

CPA-Accountant engage their TriNet Sales Consultant to work with them to evaluate the clients needs, level of engagement and services they provide to their clients. In many cases CPAs and Accountants have an active role in their clients' business and/or act as a backup for their clients to keep the business moving forward.

In the Trusted Advisor Role, they can:WFA

- Enter in Payroll information on behalf of the client and be a liaison for any payroll changes.
- **Provide Year-End Adjustments that impact W2's etc…**
- Enter New Employee Information
- **Administration of HR Suite**
- Submit changes/additions to the company policies
- Set up employee time off policies
- **Provide client with HR reports**
- **Integrate information with Accounting system**
- Actively support client for recruiting (TriNet Hire)
- **Help secure Tax Credits i.e. Employee Retention Tax Credits**

© 2022 TriNet Group, Inc. All rights reserved.

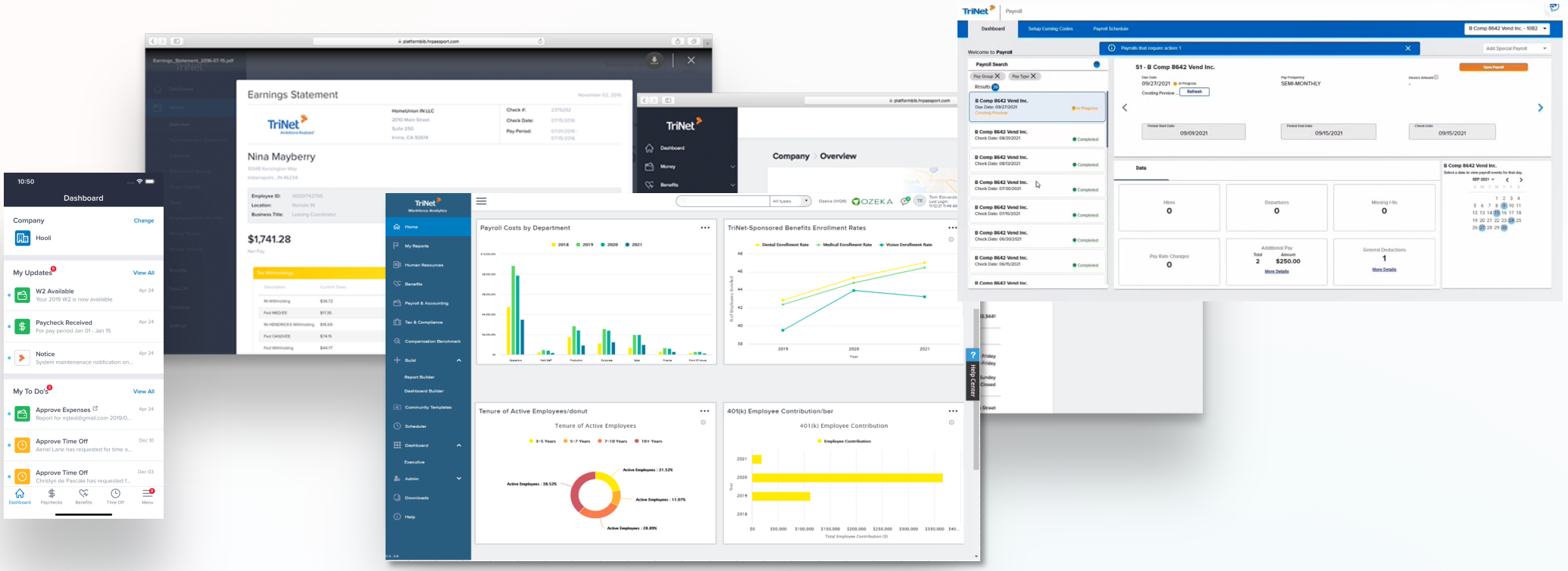
KIWI PARTNERS

TriNet

# Trusted Advisor Access: thru Technology Platform

## A Partnership Solution so, you can focus on your business

- New Hire Onboarding
- Payroll Processing
- Applicant Tracking
- Workforce Analytics
- Benefits Enrollment
- Grant Tracking
- Performance Management
- Expense Management
- Integration Center
- Salary Benchmarking Tools




TriNet © 2022 TriNet Group, Inc. All rights reserved.

KIWI PARTNERS

TriNet

# Workforce Analytics: Next Generation of Trusted Advisors

## Simple

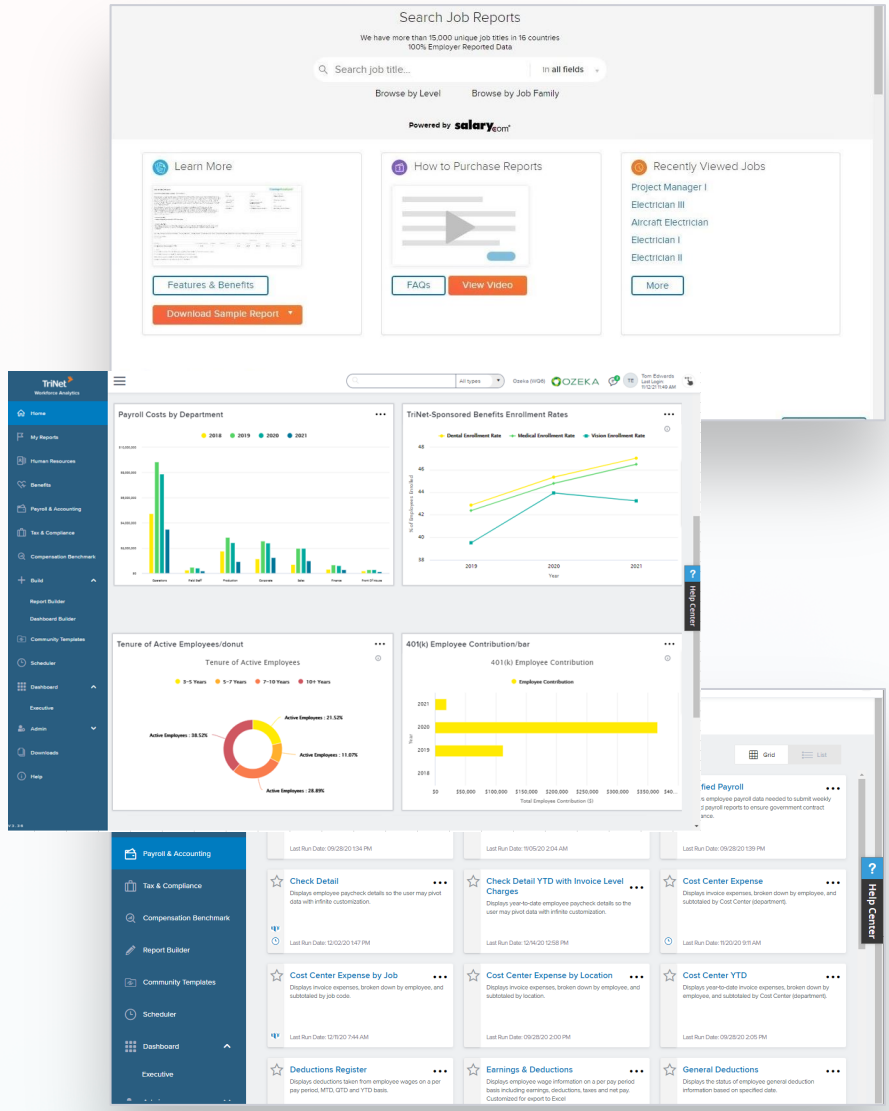
- Intuitive navigation
- Visual dashboards
- Integration with QuickBooks™ Online, Xero™, Intacct®, Netsuite®

## Powerful

- Access custom compensation benchmark reports
- Generate and schedule standard and custom reports
- Manage user access
- Export and download reports

## Flexible

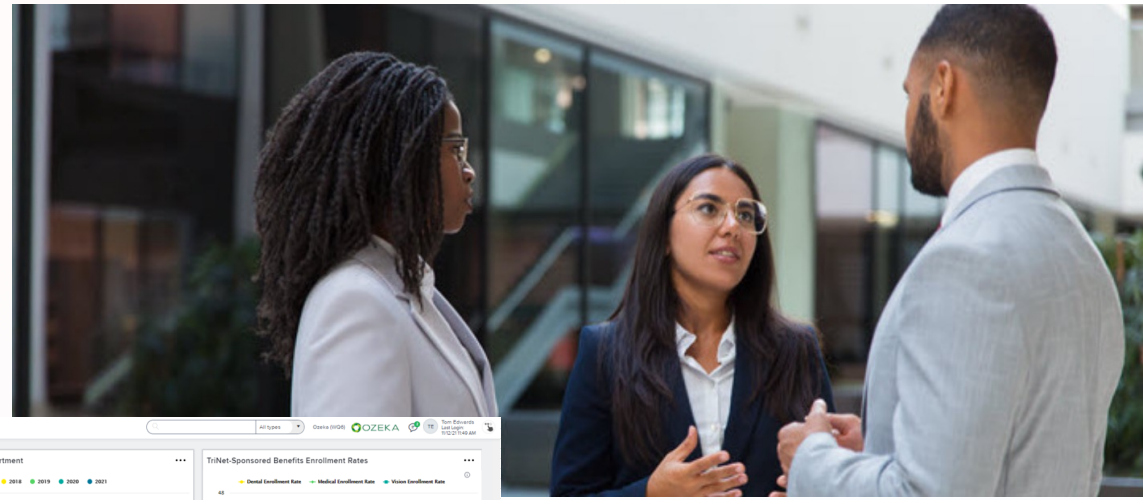
- Customize report views
- Save favorite reports to dashboard
- Combine data from related companies




TriNet © 2022 TriNet Group, Inc. All rights reserved.

KIWI PARTNERS

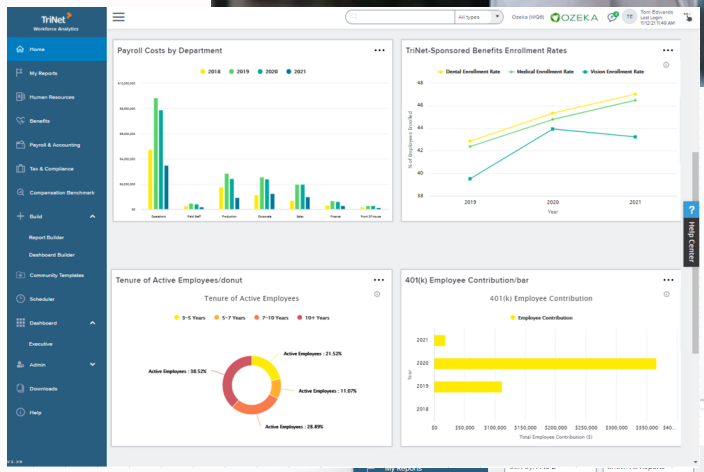
TriNet

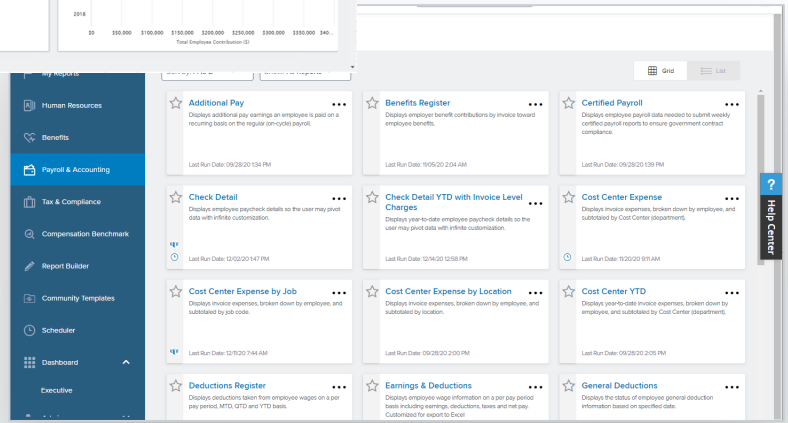


# Workforce Analytics:
# Developing HR Initiatives

## Leverage Data to inform diversity practices

- **How diverse is my workforce and organizations leadership?**
- **Which areas of my organization are not as diverse as others?**
- **What termination reasons are affecting diversity the most?**
- **Are my employee engagement scores decreasing / increasing?**




"The best place to start with all diversity, equity and inclusion initiatives is with understanding your workforce demographics so you can assess and prioritize what to do and where to focus. General organizational census data is only the start,"

TriNet © 2022 TriNet Group, Inc. All rights reserved.

KIWI PARTNERS

TriNet

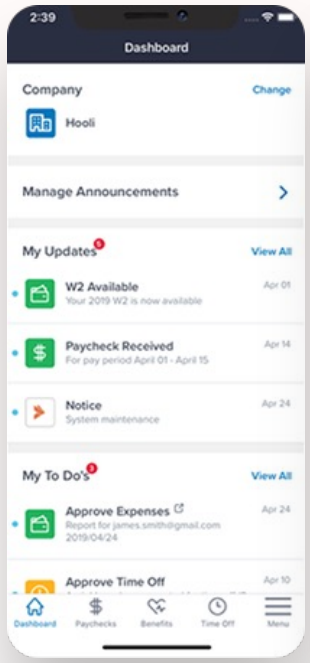
# Integration Center:
## Unify Your Data

- Pre-built integrations engineered by TriNet and APIs for your more complex business needs
- Freedom to use the necessary business applications without worrying about incongruent data
- Direct syncing reduces errors associated with manual data sharing
- Secure and accurate data flow between TriNet platform and applications

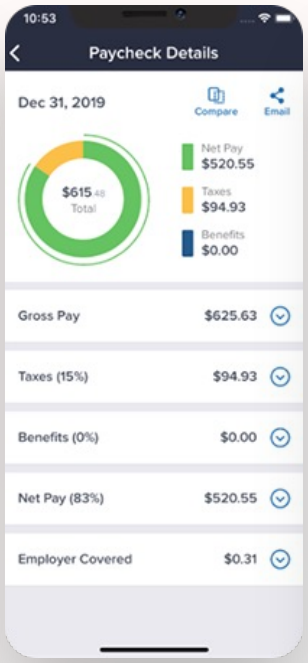



TriNet © 2022 TriNet Group, Inc. All rights reserved.

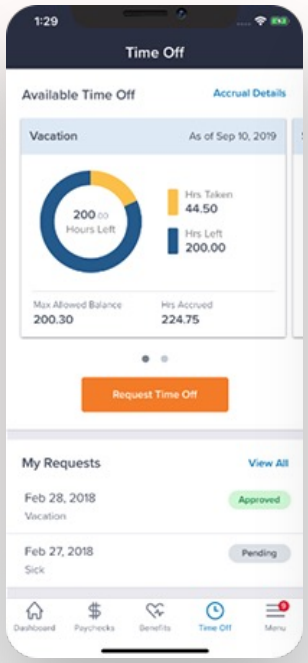
# TriNet Mobile: HR at Your Fingertips



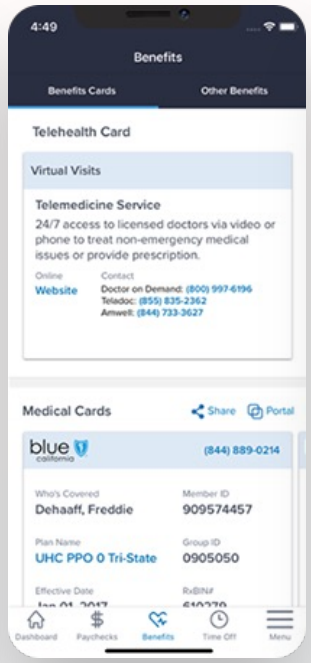

Check Company Notifications



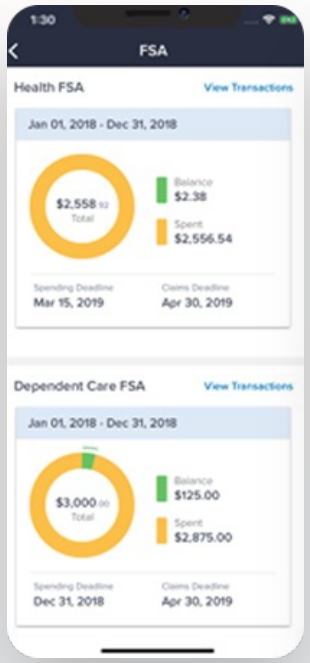

View Your Paychecks



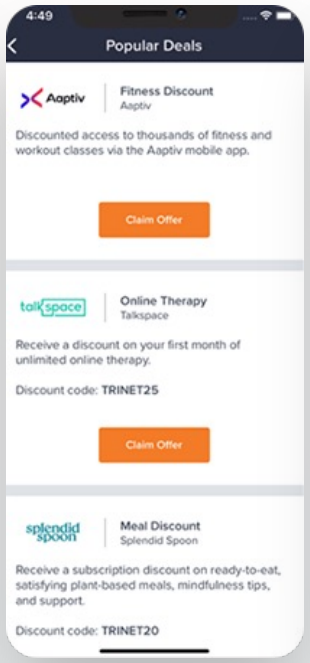

Manage Your Time Off



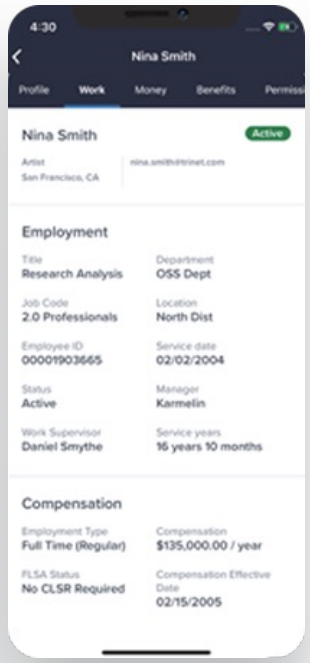

Access Your Benefits Card




Manage Your Flex Spending




Claim Special Discounts




Manage Your Employee Info

4.8

iOS App store rating based on 18K ratings (11/8/21)

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# Trendspotting: NonProfits working with PEO's

NATIONAL COUNCIL OF NONPROFITS
National voice. State focus. Local impact.




## Trendspotting: Smaller Nonprofits and Foundations Working with PEOs

Compliance, competition, capacity: the three main challenges facing smaller nonprofits and foundations when it comes to human resources.

- Compliance with ever-changing statutes and regulations at the federal, state, and local levels.
- Competition for talent, which requires offering attractive, affordable benefits to recruit and retain employees.
- Capacity to stay on top of the changing laws and all aspects of the relationships with vendors of numerous benefits (e.g., selecting, negotiating with, and maintaining relationships).



Henry Berman, Chief Executive Officer, Exponent Philanthropy

Dropping the ball on any aspect of HR could mean (i) diverting even more time and funds from mission to fix errors and pay any fines for noncompliance, (ii) paying more than needed on employee benefits or selecting the wrong options, and (iii) distracting the organization's leaders from other pressing matters. And on top of all that, add the costs of damaging employee morale if benefits are weak or poorly administered.
Given the multi-faceted and time-consuming responsibilities of HR, an increasing number of nonprofits and foundations have been turning to a solution called a Professional Employer Organization. The PEO model allows employers to outsource HR risks, lower HR-related costs, benefit employees, and free staff time.

We both have positive experiences working with a PEO; Exponent Philanthropy offers TriNet as a benefit to its members.

TriNet © 2022 TriNet Group, Inc. All rights reserved.

## The First Republic Difference:

- ✓ A single point of contact backed by a team of financial professionals who know you, your accounts and how you like to do business
- ✓ An entrepreneurial environment where decisions are made quickly and complex financial issues are met with creative thinking and action

**Now, when you open a Business Analyzed Checking account with a $100,000 monthly average balance, you can reduce — or eliminate altogether — both your TriNet and First Republic bank fees.**

## Special Benefits for One Year:

- ✓ Rebated TriNet fees up to $25,000
  - Fees will be rebated monthly, not to exceed $2,083.33 per month
  - Unused fee rebates do not roll over to the next month
- ✓ Waived First Republic Bank fees

## Special Benefits After One Year:

- ✓ Utilize First Republic's market-leading 1.00% earnings credit rate to offset both bank and TriNet fees

FIRST REPUBLIC BANK
It's a privilege to serve you℠

## Special Offering:

- Preferred Pricing discounts
- Waived setup fee ($2,500 - $10,000
- 90 - day satisfaction guarantee

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# Questions?



**John Littler, TriNet**
National Director, Accountant Alliances
John.Littler@TriNet.com



**Michele Pasquale, TriNet**
Senior Sales Consultant | Professional Services
Michele.Pasquale@TriNet.com



**Ardelle Stoute, TriNet**
Senior Sales Consultant | NonProfit
Ardelle.Stoute@TriNet.com

TriNet © 2022 TriNet Group, Inc. All rights reserved.

# Connect with us!

@kiwipartners

http://www.linkedin.com/company/kiwi-partners-inc-




Diana Gallardo

J.D. SPHR, SHRM-SCP

SVP of HR Services

dgallardo@kiwipartners.com





Solana Cederboim

MSHR, SPHR

VP of HR Services

scederboim@kiwipartners.com


## Subscribe to our Blog

Receive insights on topics such as DEI, compliance, compensation, benefits, recruitment, & more!

Scan QR code or subscribe via link: bit.ly/3jgtf1q

Thank you

