

## 1. TOTAL COMPANY HEADCOUNT

<b>Include</b>	<ul style="list-style-type: none"><li>• Open, budgeted positions</li><li>• Part-time employees</li><li>• This total should be higher than FTE (full-time equivalent) count</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Temps / Contracted staff</li></ul>

Answer: \_\_\_\_\_  
Format: 0.00

## 2. TOTAL FTE (FULL-TIME EQUIVALENTS) THIS QUESTION IS REQUIRED.

<b>Include</b>	<ul style="list-style-type: none"><li>• Open, budgeted positions</li><li>• Full-time equivalent (i.e., two .50 P/T employees are equivalent to 1 FTE)</li><li>• Should be less than total headcount (previous question [17B])</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Temps / Contracted staff</li></ul>

Answer: \_\_\_\_\_  
Format: 0.00

## 3. TOTAL ANNUALIZED EMPLOYEE COMPENSATION

<b>Include</b>	<ul style="list-style-type: none"><li>• Gross salaries, wages, overtime, commissions/bonuses and incentive pay</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Benefits or taxes that your organization pays (See 'Total annualized benefits' [17B])</li></ul>

Answer: \_\_\_\_\_  
Format: \$0

## 4. OF TOTAL ANNUALIZED COMPENSATION, DOLLAR AMOUNT OF ALL COMMISSIONS / BONUSES PAID

Answer: \_\_\_\_\_  
Format: \$0

## 5. TOTAL ANNUALIZED EMPLOYEE BENEFITS EXPENSES

<b>Include</b>	<ul style="list-style-type: none"><li>• Payroll taxes, i.e., social security, state, federal unemployment and Medicare taxes, company paid health insurance premiums, 401(k) matching, pension fund, stock options, profit sharing plan, and employee savings plan</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Paid time off</li></ul>

Answer: \_\_\_\_\_  
Format: \$0

## 6. TOTAL POSITIONS FILLED ON AN ANNUALIZED BASIS AS OF 12-31-16

<b>Include</b>	<ul style="list-style-type: none"> <li>Positions filled last year, annualized, including positions filled more than once and/or internally</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Temporary positions</li> </ul>

Answer: \_\_\_\_\_  
Format: 0

7. WHAT IS YOUR TOTAL EMPLOYEE TURNOVER RATE? (AS A PERCENTAGE OF TOTAL HEADCOUNT) AS OF 12-31-16

<b>Instructions</b>	Turnover is defined as annualized # of terminations (voluntary + involuntary) divided by total headcount. Do not include job eliminations or internal promotions/changes in job function. Use data from the reporting period used for this study.
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Answer: \_\_\_\_\_  
Format: 0%

8. WHAT IS YOUR ANNUALIZED BRANCH TURNOVER RATE? (AS A PERCENTAGE OF TOTAL BRANCH HEADCOUNT AS OF 12-31-16)

<b>Instructions</b>	<ul style="list-style-type: none"> <li>Turnover is defined as annualized # of terminations (voluntary &amp; involuntary) divided by total branch headcount. Use data from the reporting period used for this study.</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Job eliminations or internal promotions/changes in job function</li> </ul>

Answer: \_\_\_\_\_  
Format: 0% Max 100

9. ANNUAL HUMAN RESOURCES OUTSOURCED EXPENDITURES

<b>Include</b>	<ul style="list-style-type: none"> <li>Outsourced services</li> <li>COBRA administration</li> <li>Patient advocacy services</li> <li>Short term disability advice to pay services</li> <li>Retirement plan administration</li> <li>401k plan administration</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Premiums paid for medical insurance, dental insurance, long term disability insurance, life, AD and D insurance, 401k benefit/matching contributions</li> <li>Software costs</li> </ul>

	Outsourced HR Services Costs \$
HR Exec/Manager/Director	
Recruitment	
HRIS services (not software costs)	

Compensation services	
Payroll services (not software costs)	
Benefits Administration	
Employee Relations	
Other HR outsourced services	

**10. HR EXEC/MANAGER/DIRECTOR FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Coaching and supervision of HR and Training employees</li><li>• Attending management meetings, leading internal meetings</li><li>• Handling of escalated departmental issues</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Material time spent on completing specific HR functions/'day-to-day' tasks captured elsewhere in this section (i.e., Recruitment, HRIS, Compensation, Payroll, Benefits Administration, Employee Relations (or other non-management functions))</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

**11. RECRUITMENT FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Drafting review/approval of job postings (often in coordination with line of business mgmt.)</li><li>• Placement of ads, job search listings</li><li>• Review/Organization of incoming applicants</li><li>• Pre-screening of (typically non-entry level) candidates, background checks</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• 3rd party or outsourced recruitment FTE</li><li>• Tasks related to other areas outside recruitment, i.e., training</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

**12. HRIS (HUMAN RESOURCES INFORMATION SYSTEM) FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Starting or maintaining employee files/records as part of on-boarding and/or exit interview process</li><li>• Reporting related to HR system of record</li></ul>
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Answer: \_\_\_\_\_

Format: 0.00

**13. COMPENSATION FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Research related to market rates for standard and specialized positions</li><li>• Updates to/data downloads from compensation system with new hires/promotions</li><li>• Communications/policies related to compensation philosophy, exceptions, etc.</li><li>• Overall management of the incentive and stock purchase plans</li></ul>
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Answer: \_\_\_\_\_

Format: 0.00

**14. PAYROLL FTE**

<b>Include</b>	Included regardless of where function resides in organization: <ul style="list-style-type: none"><li>• Payroll processing including entering data into payroll system/transmitting to third-party payroll provider</li><li>• Updating system to reflect compensation or full time/part time</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Payroll processing services for customers (See 'Deposit Operations' [11])</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

**15. BENEFITS ADMINISTRATION FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Managing third-party benefits providers, coordinating enrollment process, termination of benefits, responding to employee questions about benefits, benefits-related internal communications, and management of information resources/forms</li></ul>
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Answer: \_\_\_\_\_

Format: 0.00

**16. EMPLOYEE RELATIONS FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Escalation of personnel issues</li><li>• Coordination and review of performance appraisals</li><li>• Conducting exit interviews</li></ul>
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Answer: \_\_\_\_\_

Format: 0.00

**17. GENERAL HR - OTHER FTE**

<b>Include</b>	<ul style="list-style-type: none"><li>• Any HR functions not listed in the preceding categories</li><li>• Managing content for company intranet</li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• HR functions captured elsewhere in this section (i.e., Recruitment, HRIS, Compensation, Payroll, Benefits Administration, or Employee Relations)</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

**18. HUMAN RESOURCES - OTHER FTE DESCRIPTION**

<b>Instructions</b>	<ul style="list-style-type: none"><li>• Describe the duties and positions if you allocated employees to the 'Other' FTE category</li></ul>
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Answer: \_\_\_\_\_