

1. TOTAL COMPANY HEADCOUNT

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

Answer: _____
Format: 0.00

2. TOTAL FTE (FULL-TIME EQUIVALENTS)

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

Answer: _____
Format: 0.00

3. TOTAL ANNUALIZED EMPLOYEE COMPENSATION

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

Answer: _____
Format: \$0

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

Answer: _____
Format: \$0

5. TOTAL ANNUALIZED EMPLOYEE BENEFITS EXPENSES

Include	<ul style="list-style-type: none">• 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
Exclude	<ul style="list-style-type: none">• Paid time off

Answer: _____
Format: \$0

6. TOTAL POSITIONS FILLED ON AN ANNUALIZED BASIS AS OF 12-31-18

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

Answer: _____
 Format: 0

7. WHAT IS YOUR TOTAL EMPLOYEE TURNOVER RATE? (AS A PERCENTAGE OF TOTAL HEADCOUNT) AS OF 12-31-18

Instructions	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 12-31-18)

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

Answer: _____
 Format: 0% Max 100

9. ANNUAL HUMAN RESOURCES OUTSOURCED EXPENDITURES

Include	<ul style="list-style-type: none"> Outsourced services COBRA administration Patient advocacy services Short term disability advice to pay services Retirement plan administration 401k plan administration
Exclude	<ul style="list-style-type: none"> Premiums paid for medical insurance, dental insurance, long term disability insurance, life, AD and D insurance, 401k benefit/matching contributions Software costs Legal fees (See [15] legal expenses) Temp agency fees

	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

Include	<ul style="list-style-type: none">• Coaching and supervision of HR employees• Attending management meetings, leading internal meetings• Handling of escalated departmental issues
Exclude	<ul style="list-style-type: none">• 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)

Answer: _____

Format: 0.00

11. RECRUITMENT FTE

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

Answer: _____

Format: 0.00

12. HRIS (HUMAN RESOURCES INFORMATION SYSTEM) FTE

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

Format: 0.00

13. COMPENSATION FTE

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

Format: 0.00

14. PAYROLL FTE

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

Answer: _____

Format: 0.00

15. BENEFITS ADMINISTRATION FTE

Include	<ul style="list-style-type: none">• 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
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Answer: _____

Format: 0.00

16. EMPLOYEE RELATIONS FTE

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

Format: 0.00

17. GENERAL HR - OTHER FTE

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

Answer: _____

Format: 0.00

18. HUMAN RESOURCES - OTHER FTE DESCRIPTION

Instructions

- Describe the duties and positions if you allocated employees to the 'Other' FTE category

Answer: _____

19. AVERAGE HUMAN RESOURCES RESOURCE COST

Include

- Total salaries and benefits expense per FTE (including director, recruitment, HRIS, compensation, payroll, benefits administration, employee relations, other FTE)

Answer: _____

Format: \$0