

# The Ideal Choice in Affirmative Action Planning



## About Berkshire Associates

Berkshire started 35 years ago as one of the first companies to release a commercial software product that automated the affirmative action plan (AAP) preparation process. As a result, Berkshire revolutionized the way AAPs were prepared and continues to set the standard for quality plan preparation. Fast forward to today and Berkshire has applied its proven methods to create innovative compliance solutions for HR professionals and has expanded its capabilities in and beyond affirmative action planning. Our offerings include a range of services, training, software, and cloud-based products that allow companies to rely on Berkshire for a full and comprehensive solution. We are one of the most sought after providers in the industry.

# BalanceAAP Affirmative Action Software

## The Ideal Choice for Affirmative Action Planning

With experience spanning four decades, Berkshire has led the way in providing companies with technical solutions for developing compliant AAPs in accordance with requirements under the Office of Federal Contractor Compliance Programs (OFCCP). Committed to identifying ways to make the affirmative action planning process more efficient, Berkshire developed balanceAAP—*the ideal choice for automated affirmative action planning*. BalanceAAP is a secure, cloud-based application that gives you more than traditional desktop software. It gives you the freedom, flexibility, and power to create your own 100% technically compliant AAP in house—right from the web. BalanceAAP contains all the features needed to fully manage and monitor your compliance objectives, including anytime, anywhere access, online collaboration capability, and regulatory updates. Its step-by-step navigation makes balanceAAP easy for users of all levels.

## BalanceAAP is the Ideal Choice

Using balanceAAP, companies can successfully prepare AAP(s); run availability vs. employment analyses; use adverse impact analyses to check for potential discrimination in personnel actions; prepare reports specifically for audit review; create an organizational profile; and generate customized narrative documents with embedded key data and reports—including the requirements for Individuals with Disabilities (IWD) and Protected Veterans (PV).

BalanceAAP can be used for just one or multiple AAPs. Plans can be prepared by single or multiple, concurrent users. Your company's remote facilities can prepare their plans without purchasing separate software licenses and without the hassles of software installation or hardware upgrades. BalanceAAP also eliminates the need to use internal IT resources for implementation and support of the software.

## **It's a Service, Not Software**

BalanceAAP is a subscription-based service that allows you to manage your entire affirmative action compliance objectives from your location. Organizations can create a central compliance “hub” designed to coordinate affirmative action and related efforts, using balanceAAP. Easily communicate goals across your organization, chart progress, and strategically shape your workforce to meet both your compliance and business goals.

## **For Any Size Company**

Unlimited access for unlimited users within your organization makes balanceAAP ideal for any size company. Affirmative action compliance can be demanding for large organizations, and often involves several individuals, departments, and locations. BalanceAAP is the answer for streamlining challenging corporate-wide initiatives. It is also an ideal solution for smaller companies who can simply log in and prepare their annual and update plans.

## **A “Living” Application**

BalanceAAP is a “living” application that is seamlessly updated. As part of your service, we manage the technology, in addition to the changes in the laws, so you can focus on preparing your plan(s). This means no upgrade interruptions, and you can trust you are preparing your plan using the most up-to-date guidelines. You are backed by our network of technical and affirmative action experts, who have a proven history of satisfying clients by delivering the right support.

## **Data Storage**

Your subscription also includes secure data storage on our servers at a certified, secure offsite location, with measures for disaster recovery. With balanceAAP you significantly reduce the risk of security breaches or lost data that can occur with desktop applications. Data is hosted and managed by Berkshire, providing a powerful and secure environment.

# Benefits of balanceAAP

## FREEDOM. FLEXIBILITY. POWER.

BALANCE*aap* provides the freedom and flexibility the Internet provides...freedom from complicated installations, and the flexibility to access your plans from anywhere, at any time. BALANCE*aap* frees you from multiple user license fees and taxing your IT resources. Imagine collaborating with other employees at different locations to streamline your plan preparation process. Envision securely publishing plans and reports to the web for easy distribution.



### This is the balanceAAP Experience:

- Unlimited users at no extra cost
- Meets the latest OFCCP requirements
- Collaborate with users from any location
- Access from anywhere, anytime
- Safe, secure, and encrypted data transfer
- Freedom from dependency on your IT resources
- Optional consulting service provides access to affirmative action experts if you need guidance

## Compliant

### 100% Technically Compliant Every Time

BalanceAAP gives you the confidence of knowing you are completing, managing, and monitoring a 100% technically compliant plan every time. From start to finish, balanceAAP guides you through every phase of the plan preparation cycle. You can complete all required reports and narratives using the guidelines mandated by OFCCP, including the IWD and PV requirements. BalanceAAP also enables you to easily generate a number of compensation summary reports to quickly identify salary inequities within grades, or job titles by race and gender.

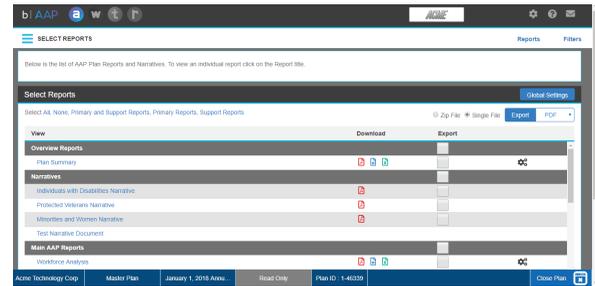
Additional reporting options are also available to perform further analysis if needed. Users can uncover and examine factors contributing to problem areas. Report options include summaries and charts for easy viewing and communicating.

BalanceAAP's built-in quality control adds another level of assurance that you're preparing a compliant and defensible plan. The extensive Error-checking and File Consistency features help you to clean data before progressing through the plan preparation process.



## Built-in Quality Control

- Extensive error-checking scans your AAP data and flags errors
- The File Consistency feature examines your data and identifies inconsistencies for employees across all personnel actions
- Built-in automated functions allow common errors and issues to be fixed in batches to make the validation process more efficient



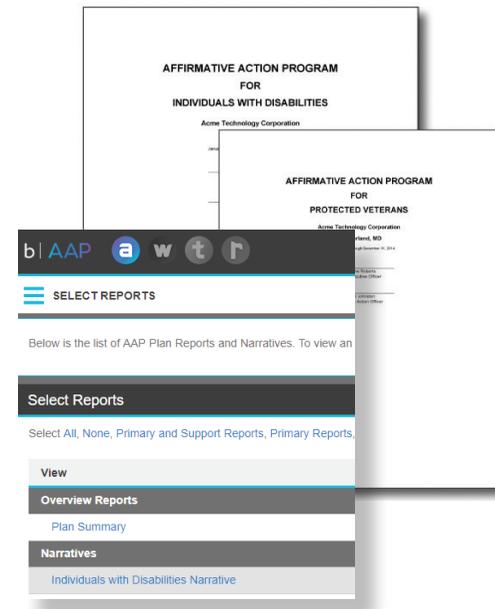
## Create All OFCCP Required and Support Reports

### Standard and Customizable Narratives

- Minorities and Women
- Individuals with Disabilities
- Protected Veterans

### Highlights of Key AAP Reports

- Plan Summary
- Job Group Analysis
- Incumbency vs. Estimated Availability Analysis (with statistical significance)
- Placement Goals Report
- Personnel Action Summaries
- Organizational Profile
- Adverse Impact Analyses
- Goal Attainment
- BalanceAAP standard reports can also satisfy the requirements of an OFCCP Scheduling Letter



### Support Reports & Graphs

- Annotated Employee List
- Roster Checklist
- Census Code Assignment
- Personnel Action Checklists

### Compensation

- Compensation Summaries
- OFCCP Compensation Analysis

### IWD/Veterans

- Data Collection for IWD
- Data Collection for PV
- Utilization Goals for IWD
- Veteran Benchmarks for Hiring Analysis

# Automated

## Automation for an Efficient, Streamlined Process

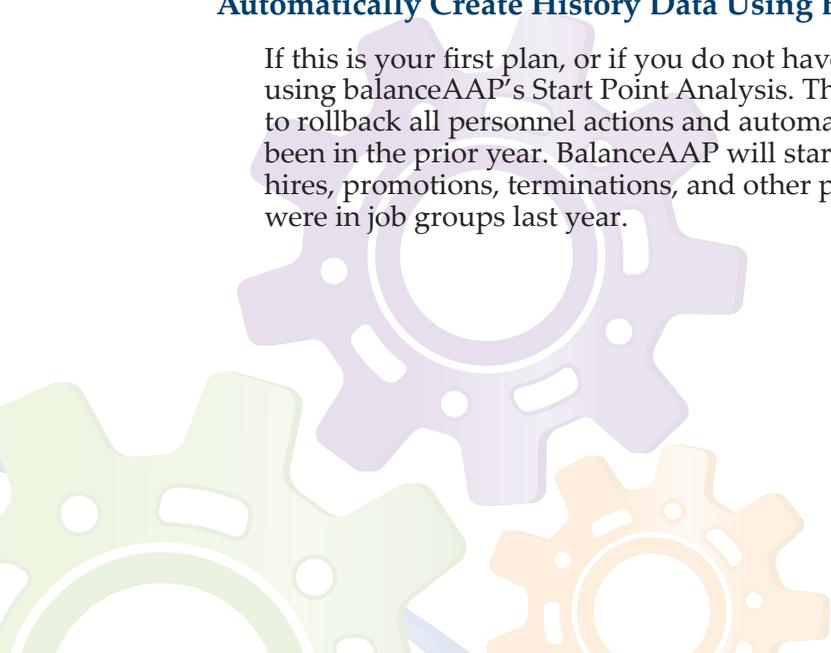
BalanceAAP automates the complex tasks necessary to efficiently prepare a compliant AAP. BalanceAAP includes tools to easily build recruitment areas, or even jump-start the census coding process, using balanceAAP's Auto Census Coding feature. Save time and resources with balanceAAP's automated functionality.

- Automated data import and mapping wizard
- Create multiple plans with a single data set
- Build unlimited number of customized recruitment areas
- The Recruitment Area Wizard allows you to automatically generate recruitment areas based on employee or applicant zip codes
- Auto-census coding for jobs
- Quickly reconcile applicant flow with new hire information using the "Apps to Hires" Analysis
- Start Point™ Analysis quickly creates history data for Adverse Impact and Goal Attainment reports
- Publish reports and graphs securely online for distribution to your management team
- Perform "what-if" analysis with different Utilization rules and settings



## Automatically Create History Data Using Berkshire's Start Point Analysis

If this is your first plan, or if you do not have a prior year's plan, easily create history data using balanceAAP's Start Point Analysis. The Start Point Analysis uses your current plan data to rollback all personnel actions and automatically determines what your goals would have been in the prior year. BalanceAAP will start with the current employee roster, and reverse the hires, promotions, terminations, and other personnel actions to calculate how many people were in job groups last year.



## Create Multiple Plans Using a Single Data Source

Required to prepare multiple plans? BalanceAAP allows users to create a Master plan to capture and organize data from a single data set. This eliminates the need to import data every time you create a plan for a different location. A function so efficient and convenient, it significantly cuts down your plan preparation time and further streamlines your process.

- Import a single data set for your entire organization
- Set up common information (reference tables, recruitment area defaults, weight factors) in one place for use in all plans
- Create your Master Plan and simultaneously have plans for each individual facility or function created and updated—customize each plan as needed
- Create plan summaries and rollups of individual plans to get an overall look at your organization

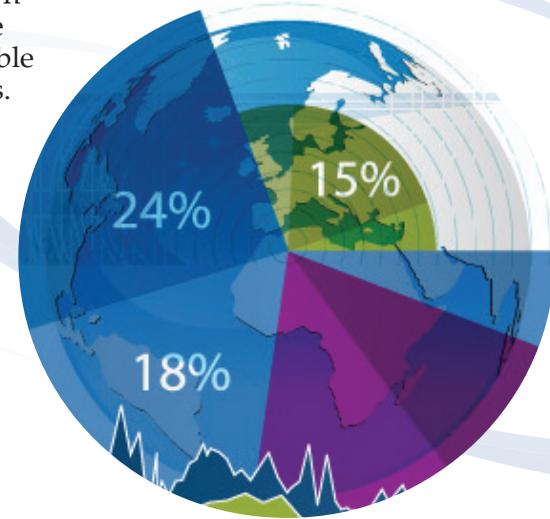
## Create Unlimited Recruitment Areas

With your balanceAAP subscription, enjoy the convenience of creating unlimited recruitment areas based on your hiring practices. Recruitment areas can be created for any geographic area, with different options for creating uniform or weighted combinations. Data can be compiled for a single geographical region or a combination of several different areas.

- BalanceAAP allows you to create and use unlimited recruitment areas
- Specialized sets of data, including information by industry, education, and age are included
- You can create custom recruitment areas, using combinations and weighting where necessary

## Drilldowns and Rollups

Perform deeper multi-level analyses using balanceAAP's Drilldown and Rollup features. Drilldowns allow users to segment workforce data into levels or groups for more granular analyses. Rollups enable users to roll data up across AAPs by multiple organizational levels. Both features allow you to go beyond the regulatory structure to create reporting by organizational units that are more meaningful to your organization.



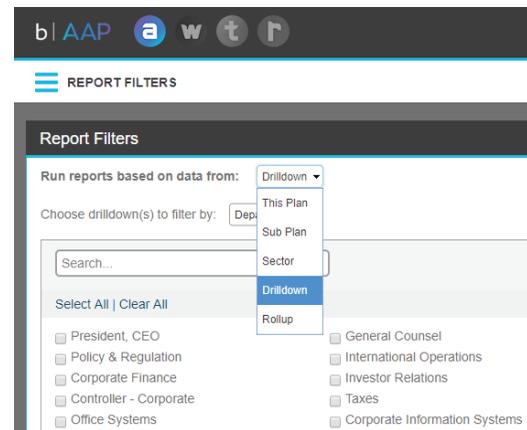
# Easy

## Point and Click Your Way to a Complete Plan

If you can “point and click,” you’re on your way to preparing your organization’s AAP. BalanceAAP *User’s Guide* and Help features are available within the software to offer further guidance throughout the plan preparation process. Whether you’re new to affirmative action or an experienced professional, balanceAAP includes Help options to support users of all levels. For power users, balanceAAP also allows you to navigate directly to the function you need to perform. Integrated video tutorials are available on many screens to walk you through key steps in the process.

## Help Features

- Keyword search on specific topics
- Complete your plan at any experience level—from beginner to advanced
- Quick reference information on terms and functions
- Guided data import from various file formats
- Fix data errors and inconsistencies, right on the screen; no need to re-import
- Integrated videos, showing you how to complete key activities step by step



## Backup and Restore

BalanceAAP’s Backup and Restore feature makes it easy for you to correct mistakes or redo calculations if needed. The Backup feature saves your plan in its current state, so users can Restore information at any time in the future, providing a valuable safety net during plan preparation.



# Effective Compliance Management

## Easily Monitor Your AAP Efforts

We understand the complexity of today's compliance environment, and we want our clients to have the power to manage, control, and assess the state of their affirmative action efforts. BalanceAAP contains features for more comprehensive compliance management. Users can view plan results in a number of interactive charts and graphs, evaluate program performance, securely publish reports and plans online, and document Good Faith Efforts (GFEs) using balanceREACH.

## Executive Dashboard

BalanceAAP includes an executive dashboard that provides a high-level overview of AAP results. The dashboard vividly displays plan information using a variety of easy-to-read graphs and metrics. Users benefit from the easy assessment of plan performance for faster decision-making, and to drill down for further examination when necessary.

## Reports Distribution

Preparing an Affirmative Action Plan (AAP) can result in creating numerous reports, even for a single plan, and if you are a larger organization that number can easily increase to hundreds of reports. Sharing your reports in balanceAAP gives you the convenience of creating a secure, centralized AAP infocenter where you can easily publish reports and plans, and give access to individuals as needed.

## Good Faith Efforts Tracking



BalanceREACH is an outstanding tool for tracking your company's good faith efforts in accordance with affirmative action regulations. All balanceAAP users have complimentary access to this application. Using balanceREACH, you can document your recruitment and outreach activities, and also store sources that target specific underrepresented groups. As your HR recruiters or staff members conduct outreach efforts, they can track and document activities in one central database. When it comes time to prepare your affirmative action plan, the activities and sources can then be pulled into the appropriate narrative.

# Secure

## Layers of Safety and Security

BalanceAAP offers the peace of mind that sensitive data is safe and secure, yet available at any time. As a cloud-based solution, balanceAAP lowers the risk associated with computer viruses, network reliability, and system crashes. BalanceAAP also gives you extensive controls when assigning permissions so you can manage exactly what users can access. You don't have to worry about losing your AAP plan data in the event something happens to your computer. Plan data is backed up and remains secure on our servers in a certified, secured data center that uses state of the art technology to protect our systems and your data. Berkshire ensures 99.99% uptime and access to your AAP information.

## Your Data is Protected and Secure

- Data and plans are secure on Berkshire servers in a certified, secure data center
- Regularly scheduled data backups and fully implemented Disaster Recovery Plan
- Berkshire uses 256-bit encryption for all data sent to and received from balanceAAP
- Customizable password requirement, allowing for extremely strong and complex protection
- Single-Sign-On (SSO) capable
- Permissions can be defined at the system and plan levels for participant roles, such as plan owner, HR staff, and executive management

## Technical Support

BalanceAAP includes support with your subscription, so you have technical help when you need it. Product support is available by phone or by email.

## Contact Us

For more information on balanceAAP or to schedule a live demo, please contact Berkshire at:

800.882.8904

[bai@berkshireassociates.com](mailto:bai@berkshireassociates.com)

[www.berkshireassociates.com](http://www.berkshireassociates.com)



# BalanceAAP Training

To get the most out of your investment, we recommend training to ensure your staff is well-equipped to create, deploy, and monitor your organization's AAPs.

## BalanceAAP Training

This training is highly recommended for users who are new to balanceAAP. Expert instructors walk participants through a full overview of software features, bringing you one step closer to a smooth planning process. Training is key to reducing potential user errors, and ultimately creating a compliant plan for your company. After completing balanceAAP training, participants should be able to develop a basic affirmative action plan on their own.

## Other Helpful Berkshire Services and Solutions

### Training Options

- Collaborative Plan Development—Work Side-by-Side with an Expert
- Fundamentals of Affirmative Action Classroom Training
- Introduction to Affirmative Action eLearning
- Affirmative Action Planning for Talent Acquisition eLearning
- AAP Boot Camp—First learn AA/EEO laws, then how to use balanceAAP to complete your plan

### Applicant Tracking Software

Berkshire's balanceTRAK applicant tracking system streamlines your hiring process plus it provides the applicant data you need to comply with affirmative action requirements. BalanceTRAK is the perfect companion to balanceAAP. Ask about adding balanceTRAK to your order.

### Compensation Solutions

- Pay Equity Analyses—Identify pay disparities to remedy unfair pay practices
- Base Pay Grade Structures—Create an internally equitable and externally competitive pay structure
- Market Surveys—Establish competitive salary models for your industry and geographic region

### Workforce Analytics

- Adverse Impact Analyses—Identify potential problem areas in personnel actions
- Diversity Metrics—Use your data to analyze diversity and inclusion efforts in your organization



## **BERKSHIRE ASSOCIATES**

8924 McGaw Court  
Columbia, Maryland 21045

800.882.8904  
[bai@berkshireassociates.com](mailto:bai@berkshireassociates.com)  
[www.berkshireassociates.com](http://www.berkshireassociates.com)