IN THIS CHAPTER

- Introducing HR metrics
- Developing a blueprint to communicate the intended result and needs
- Defining over 100 HR metrics

Appendix **A**

HR Metric Definitions Guide

Metric definitions are central when it comes to the efficient production of quantitative facts that can be put together in many different ways to answer questions and present insights visually. Figure A-1 shows the basic workflow of reporting for standardized visual reporting. Notice how metrics are smack-dab in the middle of everything.

The tools you use to work with (and visualize) HR data will vary, and so will the ways in which you're required to instruct those systems to do what you want. The definitions provided in this section are designed to provide a standard convention to communicate what the HR metric is, what its basic components are, and which operators need to be applied to those components to produce the desired end result — regardless of the environment you're operating in.

Think of metric definitions like these as if they were the blueprints for a building. Like a blueprint, metric definitions are not intended to be detailed instructions, as in "Do this, then do that. Hammer this way, not that way." Instead, HR metric definitions are guidelines that provide a rough outline for planning and communication on the jobsite. You might use these definitions as plans to calculate the metrics yourself, or you might provide these details to other people who have specialized competence in a specific data environment in which your company wants to operate.

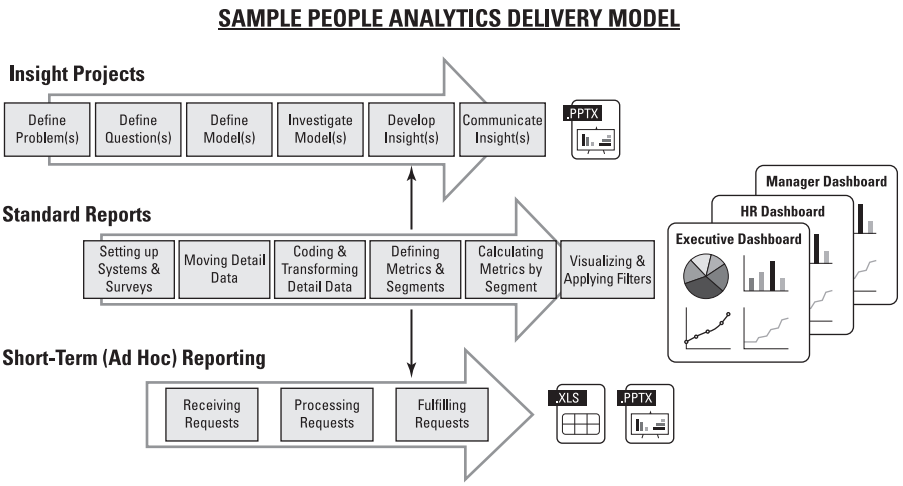


FIGURE A-1: Metric definitions are central.

If you were an architect assisting in the construction of a physical building, you would expect to have specialists — like carpenters, plumbers, electricians, and other types of people — working together on the jobsite. The blueprint is a central abstraction: Everyone understands what you're building and how it all fits together so that everyone builds with the same end result in mind.

In people analytics, you also work with various types of specialists, and you need a way for them to communicate with each other as well. Here are the types of people you need to be able to interact with regarding what you're trying to achieve with HR data:

- **IT people responsible for enterprise information technology architecture and security:** Responsibilities often include selection, project management, support, and security of the company's overall information technology landscape.
- **IT people responsible for enterprise data architecture and reporting:** Responsibilities in this category include business intelligence (BI), data warehousing, and data lake management.
- **HR information technology (HRIT) people (sometimes called *HRIS people*):** Responsibilities include the HR systems that you use as the system of record for employment and to administer the day-to-day activities and interactions with HR.
- **Statisticians, sometimes called *data scientists:*** Responsibilities include statistics and machine learning.
- **Specialized HR science professionals,** like industrial organizational psychologists or organization behaviorists. Responsibilities include design and application of research methods ranging from survey research to experimental design.

Like a blueprint for a physical structure, metric definitions provide a blueprint for all these different types of people who need to communicate with one another regarding the technical specifications so that they can create what you want to achieve with reporting and analysis.

HR Metric Definition Conventions

Figure A-2 acts as an introduction to the basic conventions I use in this metric instruction guide.

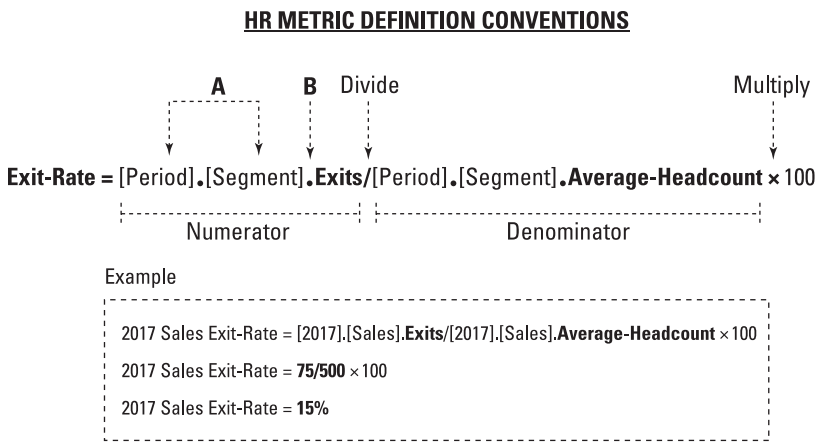


FIGURE A-2: HR metric definition conventions.

Though each metric is different, all metrics consist of similar parts, which means that you try to express them in a consistent manner.

"A" in the metric calculation convention illustrated by Figure A-2, is used to indicate a filterable component that includes many options. In the figure, I show the 2017 Sales Exit-Rate, but since there are many time periods and segment options, the [Period] and [Segment] filters remain unspecified to show that you can (and will) calculate this metric for many different time periods and segments.

Unless indicated otherwise by the calculation definition, the [Period] and [Segment] filters applied to measure(s) in the numerator typically must be applied to the measure(s) in the denominator as well.

"B" in the metric calculation convention illustrated in Figure A-2 is used to convey a subset. For example, "[2017][Sales].Exits" means only exits within the Sales division in 2017.

An important component of all metrics is the *segment,* which represents the focus of the metric or filter. Though the range of possible segments is nearly infinite, some examples of the main categories of segmentation are provided in the following section.

Sample segmentation dimensions

Figure A-3 shows some segmentation types.

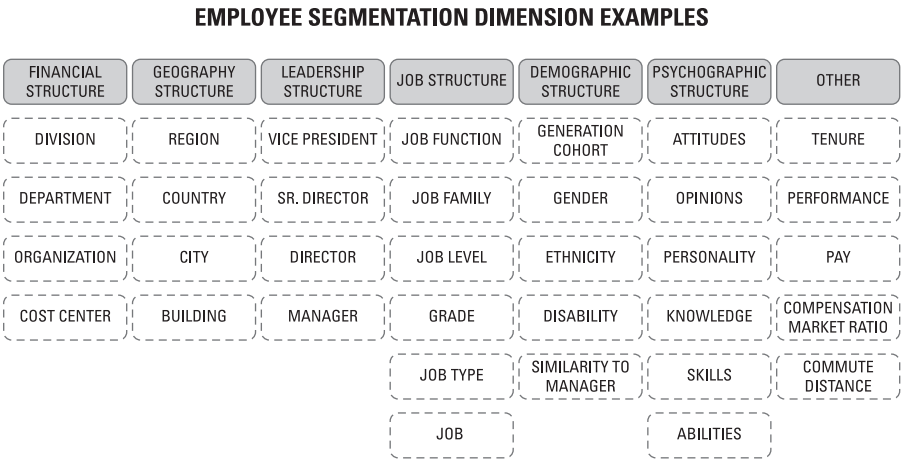


FIGURE A-3: Sample HR metric segment categories.

In Figure A-3, you find some of the types of segmentation typical of HR data. The word "dimension" represents a category of segmentation which can be broken down into subcategories, which can then be broken down into many parts. The name descriptors of the parts used in each sub-category are unique to each company and can be numerous.

For example, if you were to drill into Division, you might find segments like Sales, Operations, Research and Development, or G&A, or you might find different names that are unique to your company. These can often then be broken down even further into individual business units or cost center parts. A common segment dimension is gender, with ubiquitous parts including male, female and undeclared. When you use segmentation in a metric, you filter and summarize the metric by the descriptors found under each category of segmentation you find useful to report by in your company.

Sample HR metric types

As you explore the list in the following section, you'll find different types of metrics. Figure A-4 gives you an idea of the standard types of HR metrics in use today.

SAMPLE METRIC TYPES

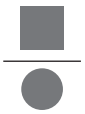
Type	Schematic	Sample Metrics
COUNT The number of something.		• End of Period Headcount • Exit Count • Hire Count
RATIO Juxtapositon of one measure to another measure as a fraction.		• Market Compensation Ratio • Operating Profit per FTE • Average Span of Control
PERCENT/RATE Proportion of a whole. Example: Company Exit Rate = percentage of all employees who exited.		• Hire Rate • Exit Rate • Growth Rate
INDEX Weighted combination of measures into one number on a scale.		• Activation Index • Engagement Index • Manager Quality Index

FIGURE A-4: Standard HR metric types.

Standard HR metric expression types include counts, ratios, percents, and indexes.

As you will see, some metrics are basic counts, which in and of themselves may or may not seem to have much value for insight. However, if you're patient and detail oriented, you can see that many of these counts are used in other, more complex compound metrics that are ratios or percents designed to measure something.

For example, in the metric definitions in the following section, I include Headcount-Start-of-Period and Headcount-End-of-Period. I use these in other metrics, like Average-Headcount. In turn, I use Average-Headcount in many other metrics, like Exit-Rate. Though Headcount-Start-of-Period admittedly has very little interest value, without it you wouldn't be able to calculate more complex and insightful compound metrics. For this reason, you will find that the comprehensive list in the following section contains some key measures and other metrics included simply because they are required to produce those key measures.

Sample HR Metric Definitions

Headcount and people movement metrics

****

Headcount-End-of-Period

Description: The number of people in a segment at the end of the selected time period.

Calculation: [Period].[Segment].(count of active employees on the last day of the period)

Output Set: {[Period].[Segment].Headcount-EOP}

****

Headcount-Start-of-Period

Description: The number of people in a segment at the start of the selected time period.

Calculation: [Period].[Segment].(count of active employees on the first day of the period)

Output Set: {[Period].[Segment].Headcount-SOP}

****

Average-Headcount — Simple

Description: The average number of people in a segment during the selected time period, calculated with a count at the beginning and end divided by two.

Calculation: [Period].[Segment].Headcount-SOP+[Period].[Segment].Headcount-EOP ÷ 2

Output Set: {[Period].[Segment].Average-Headcount-Simple}

****

Average-Headcount — Daily

Description: The average number of people in a segment during the selected time period, calculated as an average using daily values.

Calculation: [Period].[Segment].(sum of headcount on day 1 in period + headcount on day 2 in period + day 3, day 4, . . . until last day of period) ÷ [Period].(number of days in period)

Output Set: {[Period].[Segment].Average-Headcount-Daily}

****

Average-Headcount — Sample

Description: The average number of people in a segment during the selected time period, calculated as an average using a sample of values taken at equal intervals in the period.

For example, you can calculate Average Headcount over a year using a month end sample or a week end sample.

Calculation: [Period].[Segment].(sum of headcount of sample 1 in period + headcount on sample 2 in period + sample 3, sample 4, . . . until last sample day of period) ÷ [Period].(number of days sampled in period)

Output Set: {[Period].[Segment].Average-Headcount-Sample}

REMEMBER

Almost all HR metrics must be calculated with a specific period and segment focus. I have tried to make this explicitly clear by including [Period][Segment] in the calculation, however I may not always point it out in the description. The implication here is that you will be calculating these metrics for many periods and segments and that the application of most, if not all metrics, require a period and segment point of focus.

****

Headcount-Growth

Description: The increase in the number of employees in a segment from the start of the period to the end of the period.

Calculation: [Period].[Segment].Headcount-EOP – [Period].[Segment].Headcount-SOP

Output Set: {[Period].[Segment].Headcount-Growth}

****

Headcount-Growth-Rate

Description: The growth in the number of people in a segment during the selected time period expressed as a percentage of headcount at the start of the period.

Calculation: [Period].[Segment].Headcount-Growth÷[Period].[Segment].Headcount-SOP × 100

Output Set: {[Period].[Segment].Headcount-Growth-Rate}

****

Headcount-Plan

Description: A particular segment's headcount plan on a particular date.

Calculation: [Period].[Segment].(sum of headcount plan)

Output Set: {[Period].[Segment].Headcount-Plan}

****

Headcount-Plan-Achievement-Percent

Description: A particular segment headcount as a percentage of that segment's headcount plan on a particular date, expressed as a percentage.

Calculation: [Period].[Segment].Headcount-EOP÷[Period].[Segment].Headcount-Plan × 100

Output Set: {[Period].[Segment].Headcount-Plan-Achievement-Percent}

****

Hires

Description: A hire is someone who was not an employee that became an employee. As a metric, hires is a count of the number of hires in a particular segment in a particular time period.

Calculation: [Period].[Segment].(count number of hires)

Output Set: {[Period].[Segment].Hires}

****

Hire-Rate

Description: The number of hires in a segment during the reporting period expressed as a percentage of that segment's average headcount in that reporting period.

Calculation: [Period].[Segment].Hires ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Hire-Rate}

****

Hire-Rate-by Hire-Type

Description: The number of people hired during a timeframe with a specific hire classification type.

For Example: New Position or Replacement

Calculation: [Period].[Segment].[Hire-Type].Hires ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].[Hire-Type].Hire-Rate}

****

[Segment]-Percent-of-Hires

Description: The number of segment hires during the reporting period as a percentage of all hires.

Calculation: [Period].[Segment].Hires ÷ [Period].All.Hires × 100

Output Set: {[Period].[Segment]-Hires-Percent}

****

Exits

Description: An exit is someone who was an employee that leaves the company and is no longer an employee. As a metric, exits is a count of the number of exits in a particular segment in a particular time period.

Calculation: [Period].[Segment].(count number of company exits)

Output Set: {[Period].[Segment].Exits}

****

Exit-Rate

Description: The number of employee exits from a segment during the reporting period as a percentage of segment average headcount.

Calculation: [Period].[Segment].Exits ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Exit-Rate}

****

Exit-Rate-by-Exit-Type

Description: The number of employees who exited during a timeframe with a specific exit classification type.

There are multiple exit-type dimensions:

- **Type 1:** Voluntary or Involuntary
- **Type 2:** Avoidable or Unavoidable
- **Type 3:** Regretted or Non-Regretted

Calculation: [Period].[Segment].[Exit-Type].Exits ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].[Exit-Type]-Exit-Rate}

****

[Segment]-Percent-of-Exits

Description: The number of segment exits during the reporting period as a percentage of all exits.

Calculation: [Period].[Segment].Exits ÷ [Period].All.Exits × 100

Output Set: [Period].[Segment].Exit-Percent

****

Hire-Ratio

Description: The number of external hires for every exit during the selected time period.

Calculation: [Period].[Segment].Hires ÷ [Period].[Segment].Exits × 100

Output Set: {[Period].[Segment].Hire-Ratio}

****

Average-Exit-Cost

Description: The average cost of each exit during the selected period.

Calculation: [Period].[Segment].(sum of estimated exit cost) ÷ [Period].[Segment].Exits

Output Set: {[Period].[Segment].Average-Exit-Cost}

****

Retention-Rate

Description: The percentage of all employees that started the time period that did not exit the company in the time period.

Calculation: [Period].[Segment].(count of people who start period who are still active employees at end of period) ÷ [Period].[Segment].Headcount-SOP × 100

Output Set: {[Period].[Segment].Retention-Rate}

****

Internal-Movement

Description: The number of employees who moved internally during the selected time period, including transfers, promotions, and demotions.

REMEMBER

In this metric, movement is defined as changing positions. Position at start of time period does not equal position at end of time period.

Calculation: [Period].[Segment].(count all instances where an individual's [Period].[Segment].position at start of period does not equal [Period].[Segment]. position at end of period)

Output Set: {[Period].[Segment].Internal-Movement}

****

Internal-Movement-Rate

Description: The rate of internal movement by employees as a percentage of headcount.

Calculation: [Period].[Segment].Internal-Movement ÷ [Period].[Segment].Average-Headcount-Sample× 100

Output Set: {[Period].[Segment].Internal-Movement-Rate}

****

[Movement-Type]-Percent-of-Internal-Movement

Description: The percentage of movement types (demotions, promotions, or transfers) as a percentage of all internal movements.

There are multiple movement-type dimensions:

- **Type 1:** Promotion or Lateral Move
- **Type 2:** Location Change or No Location Change
- **Type 3:** Financial Unit Change or No Financial Unit Change

Calculation: [Period].[Segment].[Movement-Type].Internal-Movement ÷ [Period].[Segment].Internal-Movement× 100

Output Set: {[Period].[Segment].[Movement-Type].Internal-Movement-Percent}

[Movement-Type]-Movement-Rate

Description: The number of employees that moved during a timeframe with a specific movement classification type.

There are multiple movement-type dimensions:

- **Type 1:** Promotion or Lateral Move
- **Type 2:** Location Change or No Location Change
- **Type 3:** Financial Unit Change or No Financial Unit Change

Calculation: [Period].[Segment].[Movement-Type].Internal-Movement ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].[Movement-Type].Internal-Movement-Rate}

****

Mobility-Share

Description: The percentage of employees that experienced a promotion or transfer job move during the selected time period.

Calculation: ([Period].[Segment].Promotions.Internal-Movement + [Period].[Segment].Transfers.Internal-Movement)÷[Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Mobility-Share}

****

Promotion-Rate

Description: The percentage of employees that were promoted during the selected time period.

Calculation: [Period].[Segment].Promotions.Internal-Movement ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Promotion-Rate}

****

Talent acquisition metrics

****

Positions-Start of Period (SOP)

Description: The total number of positions (filled by an active employee or unfilled waiting for an employee) at the start of the selected period.

Calculation: [Period].[Segment].(count number of positions on the first day of the period)

Output Set: {[Period].[Segment].Positions-SOP}

****

Positions-End-of-Period (EOP)

Description: The total number of positions at the end of the selected period.

Calculation: [Period].[Segment].(count number of positions on the last day of the period)

Output Set: {[Period].[Segment].Positions-EOP}

****

Vacancies- Start-of-Period (SOP)

Description: The total number of unfilled positions at the start of the selected period.

Calculation: [Period].[Segment].(count number of unfilled positions at start of period)

Output Set: {[Period].[Segment].Vacancies-SOP}

****

Vacancy-Rate

Description: The percentage of current positions being actively recruited for.

Calculation: [Period].[Segment].Vacancies-SOP ÷ ([Period].[Segment].Positions-SOP) × 100

Output Set: {[Period].[Segment].Vacancy-Rate}

****

Requisitions

Description: Requisitions are official requests to fill an open position. The requisitions metric represents a count of the total number of open requisitions in a selected period.

Calculation: [Period].[Segment].(count the number of requisitions)

Output Set: {[Period].[Segment].Requisitions}

****

Requisitions-New-Positions

Description: The total number of open requisitions in a selected period for positions that were not previously occupied — these are new positions.

Calculation: [Period].[Segment].(count the number of requisitions for new positions)

Output Set: {[Period].[Segment].Requisitions-New}

****

Requisitions-Replacement-Positions

Description: The total number of open requisitions in a selected period for positions that were previously occupied by a job incumbent – this is a replacement hire.

Calculation: [Period].[Segment].(count the number of requisitions to replace a vacancy from a previous job incumbent)

Output Set: {[Period].[Segment].Requisitions-Replacement}

****

Applications

Description: Applications are formal requests to be considered for an open job. The applications metric represents a count of the number of applications in a selected period.

Calculation: [Period].[Segment].(count the number of applications)

Output Set: {[Period].[Segment].Applications}

****

Candidates

Description: The number of candidates in a selected period. Candidates are people who are considered for open jobs. A candidate may apply for multiple jobs and therefore may have multiple applications; therefore, there are typically more applications than there are candidates.

Calculation: [Period].[Segment].(count the number of candidates)

Output Set: {[Period].[Segment].Candidates}

****

Phone-Screens

Description: The total number of phone screens in a selected period. Phone screens are when recruiters conduct a brief interview by phone to assess a candidate for invitation to continue the recruiting process.

Calculation: [Period].[Segment].(count the number of phone screens)

Output Set: {[Period].[Segment].Phone-Screens}

****

Interviews

Description: The total number of interviews in a selected period. Interviews are when the people who will participate in the hiring decision formally assess a candidate for a hiring decision.

Calculation: [Period].[Segment].(count the number of interviews)

Output Set: {[Period].[Segment].Interviews}

****

Candidates-Interviewed

Description: The total number of *unique candidates* interviewed in a selected period.

Calculation: [Period].[Segment].(count the number of candidates who have been interviewed)

Output Set: {[Period].[Segment].Candidates-Interviewed}

****

Offers

Description: The number of job offers in a selected period. Offers are when a candidate has been selected and a formal invitation has been given to the candidate to join the company.

Calculation: [Period].[Segment].(count the number of offers)

Output Set: {[Period].[Segment].Offers}

****

Offer-Accepts [Accepts]

Description: The number of candidates with offers who have accepted those offers.

Calculation: [Period].[Segment].(count the number of offers accepted)

Output Set: {[Period].[Segment].Offer-Accepts}

****

Offer-Declines [Declines)

Description: The number of candidates with offers who have declined those offers.

Calculation: [Period].[Segment].(count the number of offers declined)

Output Set: {[Period].[Segment].Offer-Declines}

****

Average-Applications-per-Candidate

Description: The average number of applications per candidate in the selected period.

Calculation: [Period].[Segment].Applications ÷ [Period].[Segment].Candidates

Output Set: {[Period].[Segment].Average-Applications-Per-Candidate}

****

Average-Candidates-per-Requisition

Description: The average number of candidates per requisition during the selected time period.

Calculation: [Period].[Segment].Candidates ÷ [Period].[Segment].Requisitions

Output Set: {[Period].[Segment].Candidates-Per-Requisition}

****

Average-Interviews-per-Requisition

Description: The average number of interviews per requisition during the selected time period.

Calculation: [Period].[Segment].Interviews ÷ [Period].[Segment].Requisitions

Output Set: {[Period].[Segment]. Average-Interviews-per-Requisition}

****

Average-Hires-per-Recruiter

Description: The average number of hires made per recruiter in a given period.

Calculation: [Period].[Segment].Hires ÷ [Period].[Segment].Recruiter.Average-Headcount-Sample

Output Set: {[Period].[Segment].Average-Hires-Per-Recruiter}

****

Average-Phone-Screens-per-Hire

Description: Average number of phone screens it took to make a hire in a given period.

Calculation: [Period].[Segment].Phone-Screens ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].Average-Phone-Screens-Per-Hire}

****

Average-Interviews-per-Hire

Description: Average number of interviews it took to make a hire in a given period.

Calculation: [Period].[Segment].Interviews ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].Average-Interviews-Per-Hire}

****

Interview-Offer-Percentage

Description: The offers extended as a percentage of distinct candidates interviewed during the selected time period.

Calculation: [Period].[Segment].Offers ÷ [Period].[Segment].Interviews × 100

Output Set: {[Period].[Segment].Interview-Offer-Percent}

****

Interviewee-Ratio

Description: The average number of candidates interviewed to achieve an offer-accept.

Calculation: [Period].[Segment].Candidate-Interviewed ÷ [Period].[Segment].Offer-Accepts

Output Set: {[Period].[Segment].Interviewee-Ratio}

****

New-Position-Recruitment-Ratio

Description: The ratio of new position hires to replacement hires.

Calculation: [Period].[Segment].(count of hires for requisitions-new) ÷ [Period].[Segment].(count of hires for requisitions-replacement)

Output Set: {[Period].[Segment].New-Position-Recruitment-Ratio}

****

Funnel-Stage-One-Pass-Percent

Description: The percentage of applicants that pass from recruiting stage1 to the next stage, by segment, by period.

Calculation: [Period].[Segment].Stage2.Applicants ÷ [Period].[Segment].Stage1.Applicants ×100

Output Set: {[Period].[Segment].Stage1.Pass-Percent}

****

Funnel-Stage-One-Fail-Percent

Description: The percentage of applicants that do not pass from recruiting stage1 to the next stage by stage, by segment, by period.

Calculation: [Period].[Segment].Stage1.Applicants -[Period].[Segment].Stage2.Applicants ÷ [Period].[Segment].Stage1.Applicants × 100

Output Set: {[Period].[Segment].Stage1.Fail-Percent}

****

Funnel-Stage-Two-Pass-Percent

Description: The percentage of applicants that pass from recruiting stage2 to the next stage, by segment, by period.

Calculation: [Period].[Segment].Stage3.Applicants ÷ [Period].[Segment].Stage2.Applicants ×100

Output Set: {[Period].[Segment].Stage2.Pass-Percent}

****

Funnel-Stage-Two-Fail-Percent

Description: The percentage of applicants that do not pass from recruiting stage2 to the next stage by stage, by segment, by period

Calculation: [Period].[Segment].Stage2.Applicants -[Period].[Segment].Stage3.Applicants ÷ [Period].[Segment].Stage2.Applicants × 100

Output Set: {[Period].[Segment].Stage2.Fail-Percent}

****

Funnel-Stage-Three-Pass-Percent

Description: The percentage of applicants that pass from recruiting stage3 to the next stage, by segment, by period.

Calculation: [Period].[Segment].Stage4.Applicants ÷ [Period].[Segment].Stage3.Applicants ×100

Output Set: {[Period].[Segment].Stage3.Pass-Percent}

****

Funnel-Stage-Three-Fail-Percent

Description: The percentage of applicants that do not pass from recruiting stage3 to the next stage by stage, by segment, by period.

Calculation: [Period].[Segment].Stage3.Applicants -[Period].[Segment].Stage4.Applicants ÷ [Period].[Segment].Stage3.Applicants × 100

Output Set: {[Period].[Segment].Stage3.Fail-Percent}

****

Funnel-Yield-Percent [Yield%]

Description: The percentage of applicants that make through all stages to accept offer, by segment, by period.

Calculation: [Period].[Segment].Offer-Accepts ÷ [Period].[Segment].Applicants × 100

Output Set: {[Period].[Segment].Yield-Percent}

****

Offer-Accept-Rate

Description: The percentage of offers accepted during the selected time period.

Calculation: [Period].[Segment].Offer-Accepts ÷ [Period].[Segment].Offers × 100

Output Set: {[Period].[Segment].Offer-Accept-Rate}

****

Offers-Decline-Rate

Description: The percentage of offers declined during the selected time period.

Calculation: [Period].[Segment].Offer-Declines ÷ [Period].[Segment].Offers × 100

Output Set: {[Period].[Segment].Offer-Decline-Rate}

****

Referral-Rate

Description: The number of candidate referrals as a percentage of average headcount.

Calculation: [Period].[Segment].(count of the number of candidates whose source is employee referral) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Referral-Rate}

****

Average-Time-to-Fill

Description: The average number of days elapsed between the date a job requisition is approved and applicant offer accept date.

Calculation: [Period].[Segment].(sum of days between job requisition date and offer accept) ÷ [Period].[Segment].Offer-Accepts

Output Set: {[Period].[Segment].Average-Time-To-Fill}

****

Average-Time-to-Start — Company View

Description: The average number of days elapsed from the date a job requisition is approved to the date a new hire begins work.

Calculation: [Period].[Segment].(sum of days between job requisition date and employee start date) ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].Average-Time-To-Start-Company}

****

Time-to-Start — Candidate View

Description: The average number of days elapsed between application start date and the date a new hire begins work.

Calculation: [Period].[Segment].(sum of days between application start date and employee start date) ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].Average-Time-To-Start-Candidate}

****

On-Time-Delivery-Factor

Description: The average number of days that hired employee start dates differ from the plan "need-by" dates for all posted jobs in a particular segment in a particular time period.

Calculate the difference between start date and the plan need-by date per job, then sum, and finally divide by the number of open jobs during the period. If a job is filled before the plan need-by date, then the input for that job is zero.

Calculation: [Period].[Segment].(sum of days between start date and plan need-by date) ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].On-Time-Delivery-Factor}

****

Talent-Acquisition-Expenses

Description: the total cost of talent acquisition efforts — for purposes of the cost-per-hire metric.

For more detail on calculating cost-per-hire, see the Cost-Per-Hire Standard approved by the American National Standards Institute, Inc. at www.shrm.org/ResourcesAndTools/business-solutions/Documents/shrm_ansi_cph_standard.pdf

Calculation: [Period].[Segment].(sum of Talent Acquisition expenses)

Output Set: {[Period].[Segment].Talent-Acquisition-Expenses}

****

Cost-per-Hire

Description: Cost-per-hire measures the economic cost of the effort taken to fill an open job.

For more detail on calculating cost-per-hire, see the Cost-Per-Hire Standard approved by the American National Standards Institute, Inc. at www.shrm.org/ResourcesAndTools/business-solutions/Documents/shrm_ansi_cph_standard.pdf

Calculation: [Period].[Segment].Talent-Acquisition-Expenses ÷ [Period].[Segment].Hires

Output Set: {[Period].[Segment].Cost-Per-Hire}

****

Recruiting-Cost-Ratio

Description: This formula normalizes recruiting costs based on compensation as a proxy for the relative value of the new hire to the firm.

Calculation: [Period].[Segment].Cost-Per-Hire ÷ [Period].[Segment].Total-Cash-USD × 100

Output Set: {[Period].[Segment].Recruiting-Cost-Ratio}

****

Talent-Acquisition-ROI

Description: The economic value of hires per dollar invested in talent acquisition.

Calculation: [Period].[Segment].(sum of estimated Employee Lifetime Value) ÷ [Segment].[Period].Talent-Acquisition-Expenses

Output Set: {[Period].[Segment].Talent-Acquisition-ROI}

****

Total rewards — Compensation and benefits metrics

****

Base-Pay-USD

Description: The sum of base pay during a selected time period.

TIP

In all of the compensation-related metrics, when I specify U.S. dollars it is to remind you that if you have employees paid in multiple currencies, you need to standardize to a single currency before you can add the values together. You do not, however, *have* to use U.S. dollars — please standardize in the currency that a majority of your employees are paid in. If you are using a different currency than U.S. dollars, then substitute that currency for "USD" for all metrics below.

Calculation: [Period].[Segment].(sum of base pay in US dollars)

Output Set: {[Period].[Segment].Base-Pay-USD}

****

Hourly-Base-Pay-USD

Description: The sum of base pay during a selected time period divided by number of hours *(There are 2080 working hours in 1-year period).*

Calculation: [Period].[Segment].Base-Pay-USD ÷ [Period].[Segment].(sum of actual hours worked or assumed)

Output Set: [Period].[Segment].Hourly-Base-Pay-USD

****

Bonus-Target-USD

Description: The sum of bonus target dollars during a selected time.

Calculation: [Period].[Segment].(sum of bonus target in US dollars)

Output Set: {[Period].[Segment].Bonus-Target-USD}

****

Bonus-Actual-USD

Description: The sum of bonus actual dollars paid out during a selected time.

Calculation: [Period].[Segment].(sum of bonus actually paid out in US dollars)

Output Set: {[Period].[Segment].Bonus-Actual-USD}

****

Total-Cash-USD

Description: The sum of base pay + bonus target dollars during a selected time.

Calculation: [Period].[Segment].Bonus-Target-USD + [Period].[Segment].Hourly-Base-Pay-USD

Output Set: {[Period].[Segment].Total-Cash-USD}

****

Average-Cash-Compensation-per-FTE

Description: The average annual base pay and bonus cash compensation, excluding non-cash compensation, per full-time-equivalent (FTE) employee.

Calculation: [Period].[Segment].Total-Cash-USD / [Period].[Segment].FTE

Output Set: {[Period].[Segment].Average-Cash-Comp-Per-FTE}

****

Average-Cash-Compensation-per-Employee

Description: The average annual base pay and bonus cash compensation, excluding non-cash compensation, per employee.

Calculation: [Period].[Segment].Total-Cash-USD ÷ [Period].[Segment].Headcount

Output Set: {[Period].[Segment].Average-Cash-Comp-Per-Employee}

****

Average-Cash- Pay — Gender-Ratio

Description: The amount of annual cash paid to males versus females — a value of greater than 1 indicates males are paid more than females for the selected segment

Calculation: [Period].[Segment].Male.Average-Cash-Comp-Per-FTE ÷ [Period].[Segment].Female.Average-Cash-Compensation-Per-FTE

Output Set: {[Period].[Segment].Average-Cash-Pay-Gender-Ratio}

****

Restricted-Stock-Grants

Description: The sum of restricted stock units granted during a selected time period.

Calculation: [Period].[Segment].(Sum of Restricted Stock Unit grants)

Output Set: {[Period].[Segment].RSU}

****

Average-Number-of-Restricted-Stock-Grants-per-Employee

Description: The average number of stock options or restricted stock units granted per employee in a segment during the selected time period.

TIP

It's up to you how you run it, but you should probably filter average headcount to include just stock-option-eligible employees.

Calculation: [Period].[Segment].RSU ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Average-RSU-Per-Employee}

****

Bonus-Actual-as-Percent-of-Bonus-Target

Description: The average actual bonus compensation paid out as a percentage of potential bonus compensation.

Calculation: [Period].[Segment].Bonus-Actual-US ÷ [Period].[Segment].Bonus-Target-US × 100

Output Set: {[Period].[Segment].Bonus-Actual-Percent-Target}

****

Target-Bonus-Compensation-Percent-of-Total-Cash-Compensation

Description: The target bonus value as a percentage of all cash compensation.

Calculation: [Period].[Segment].Bonus-Target-USD ÷ [Period].[Segment].Total-Cash-USD × 100

Output Set: {[Period].[Segment].Bonus-Comp-Percent}

****

Bonus-Receipt-Percent

Description: The number of employees receiving a bonus as a percentage of total employees eligible to receive a bonus.

Calculation: [Period].[Segment].(count of people that received a bonus) ÷ [Period].[Segment].(count of people that were bonus eligible) ×100

Output Set: {[Period].[Segment].Bonus-Receipt-Percent}

****

Cash-Compensation-Growth-Rate

Description: The increase in cash compensation costs for employees who were with the company during the previous and current selected time periods.

Calculation: ([Period].[Segment].Total-Cash-USD – [Previous-Period].[Segment].Total-Cash-USD) ÷ Previous-Period].[Segment].Total-Cash-USD) × 100

Output Set: {[Period].[Segment].Cash-Compensation-Growth-Rate}

****

Total-Cash-Market-Benchmark

Description: A job segment Total Cash Compensation U.S. dollar target determined from a sourced external market dataset.

Most large companies participate in a third-party-hosted market compensation benchmark service, which allows each company to match its internal job codes/names to a universal external key to obtain a multi-company market pay dataset reported by median and percentile. Benchmark per job or per job family can be set at 50th percentile or something above or below. For example, many companies that seek to employ high-performing employees in a specific job or job family use a 75th percentile pay target.

Calculation: Identify and select per segment per job total cash market benchmark from external market pay dataset.

Output Set: {[Period].[Segment].Total-Cash-Market-Benchmark-USD}

****

Market-Compensation-Ratio

Description: A ratio showing segment Total Cash Compensation relative to the corresponding segment Total-Cash-Compensation-Market-Benchmark.

Calculation: [Period].[Segment].Total-Cash-USD ÷ [Period].[Segment].Total-Cash-Market-Benchmark-USD

Output Set: {[Period].[Segment].Comp-Ratio}

****

Retirement-Eligibility-Percent

Description: The percentage of employees eligible for retirement.

Calculation: [Period].[Segment].(count of people that meet company criteria to be retirement eligible) ÷ [Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].Retirement-Eligibility-Percent}

****

Retirement-Rate

Description: The employees who retire as a percentage of average headcount.

Calculation: [Period].[Segment].(count of retirements) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Retirement-Rate}

****

Total-Cash-Compensation-Percent-of-Market

Description: The ratio of employee's direct cash compensation to market-comparable direct cash compensation.

Calculation: [Period].[Segment].Total-Cash-Comp-US ÷ [Period].[Segment].Total-Cash-Comp-Market-Benchmark-USD × 100

Output Set: {[Period].[Segment].Cash-Comp-Percent-Market}

****

Average-Total-Cash-Compensation-by-Job-by-Performance Rating

Description: The average Total Cash Compensation by job by performance rating category.

Calculation: [Period].[Segment].[Job].[Performance-Rating].Total-Cash-Comp-US ÷ [Period].[Segment].[Job].[Performance-Rating].Headcount-EOP

Output Set: {[Period].[Segment].[Job].[Performance-Rating].Average-Total-Cash}

****

Performance-Contingent-Pay-Percent

Description: The percentage of employees whose total compensation is at least in part dependent on individual performance.

Calculation: [Period].[Segment].(count of people with compensation contingent on performance) ÷ [Period].[Segment].Headcount-EOP ×100

Output Set: {[Period].[Segment].Performance-Contingent-Comp-Percent}

****

High-Performer-Compensation-Differential

Description: The ratio of average direct compensation for all high performers compared to the average direct compensation for all others.

Calculation: [Period].[Segment].[Job].High-Perf-Rating.Average-Total-Cash ÷ [Period].[Segment].(average direct compensation for all others, excluding High-Perf rated)

Output Set: {[Period].[Segment].High-Perf-Comp-Differential}

****

Average-Overtime-Expense-per-FTE

Description: The average overtime cash compensation per full-time-equivalent employee (FTE).

Calculation: [Period].[Segment].(sum of overtime expense) ÷ [Period].[Segment].(Total number of FTEs)

Output Set: {[Period].[Segment].Average-Overtime-Expense-Per-FTE}

****

Overtime-Expense-Percent-of-Direct-Compensation

Description: The overtime expense as a percentage of total cash compensation expense.

Calculation: [Period].[Segment].(sum of overtime expenses in US dollars) ÷ [Period].[Segment].Total.Cash.Comp-USD × 100

Output Set: {[Period].[Segment].Overtime-Expense-Percent}

****

Base-Salary-Increase-Percent

Description: The percentage of employees in a segment receiving a base salary increase during the selected time period.

Calculation: [Period].[Segment].(count of people that received a base salary increase) ÷ [Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].Base-Salary-Increase-Percent}

****

Employee-Stock-Ownership-Percentage

Description: The percentage of all company stock owned by employees.

Calculation: (count number of shares owned by employees) ÷ (count total number of shares outstanding) × 100

Output Set: {[Period].[Segment].Employee-Stock-Ownership-Percent}

****

Average-Benefits-Cost-per-FTE

Description: The average benefits cost per full-time-equivalent employee (FTE).

Calculation: [Period].(sum of benefits expense) ÷ [Period].(sum of FTEs)

Output Set: {[Period].Average-Benefits-Cost-Per-FTE}

****

Benefits-Cost-Percent-of-Revenue

Description: The total benefits cost as a percentage of company revenue.

Calculation: [Period].(sum of benefits expense) ÷ [Period].(sum of total revenue) × 100

Output Set: {[Period].[Segment].Benefits-Cost-Percent-Revenue}

****

Benefits-Type-Percent -of-Benefits-Cost

Description: The cost of employee benefits by type of benefit.

Calculation: [Period].[Benefit Type].(sum of benefits expense) ÷ [Period].(sum of benefits expense) × 100

Output Set: {[Period].[Benefit Type].Benefits -Type-Percent}

****

Benefits-Cost-as-Percent-of-Compensation-Expense

Description: The benefits expense as a percentage of total cash compensation expenses.

Calculation: [Period].(sum of benefits expense) ÷ [Period].[Segment].Total-Cash-Comp-USD × 100

Output Set: {[Period].Benefits-Percent-Comp}

****

Average-Healthcare-Costs-per-Participating-Employee

Description: The average amount spent on healthcare payments per employee participating in a company healthcare plan.

Calculation: (sum employer healthcare coverage dollar contribution) ÷ (count of employees participating in healthcare plan)

Output Set: {[Period].[Segment].Average-Healthcare-Costs-Per-Participant}

****

Leadership, learning, and development metrics

****

People-Manager-Headcount-End-of-Period

Description: The number of people employed at the end of the selected time period with one or more direct reports.


REMEMBER

In this example, you aren't counting people with the title of Manager. You're counting people who have employees that report to them, regardless of title. They have managerial responsibility as defined by reporting relationships.

Calculation: (count active employees with one or more direct reports on the last day of the period)

Output Set: {[Period].[Segment].People-Manager.Headcount-EOP}

****

Director-Headcount-End-of-Period

Description: The number of people employed at the end of the selected time period with one or more people managers reporting to them.


REMEMBER

Again, in this example, you aren't counting people with the title of Director. You're counting people who have managers that report to them, who in turn have people reporting to them. Those counted have director responsibility as defined by reporting relationships, regardless of title.

Calculation: (count active employees on the last day of the period with one or more people managers reporting to them)

Output Set: {[Period].[Segment].People-Director.Headcount-EOP}

****

Average-People-Manager-Span-of-Control

Description: The average number of direct reports for each manager.

Calculation: [Period].[Segment].Headcount-EOP ÷ [Period].[Segment]. People-Manager-Headcount-EOP

Output Set: {[Period].[Segment].Average-Manager-Span-of-Control}

****

Average-People-Director-Span-of-Control

Description: The average number of people within the span of control of each director.

Calculation: [Period].[Segment].Headcount-EOP ÷ [Period].[Segment]. People-Manager-Headcount-EOP

Output Set: {[Period].[Segment].Average-Director-Span-of-Control}

****

Bench-Strength

Description: The percentage of employee that have been identified as ready for promotion.

Calculation: [Period].[Segment].(count identified as ready for promotion) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Bench-Strength}

****

Average-Succession-Pipeline-Depth

Description: The average number of succession planning candidates for each succession planned role.

Calculation: [Period].[Segment].(count of number succession candidates) ÷ [Period].[Segment].(count of number of succession planned roles)

Output Set: {[Period].[Segment].Succession-Pipeline-Depth}

****

Succession-Planning-Rate

Description: The percentage of key positions filled by internal succession planning candidates.

Calculation: [Period].[Segment].(count of key positions filled by succession planning candidates) ÷ [Period].[Segment].(count of key positions filled) × 100

Output Set: {[Period].[Segment].Succession-Planning-Rate}

****

Leadership-Development-Plan-Percent (LDP-Percent)

Description: The percentage of managers with leadership development plans (LDPs) in place.

Calculation: [Period].[Segment].[Manager]-Headcount-EOP with LDP ÷ [Period].[Segment].[Manager]-Headcount-EOP × 100

Output Set: {[Period].[Segment].LDP-Percentage}

****

Manager-Churn-Percent

Description: The percentage of employees who have had more than one manager within the most recent 12 months.

Calculation: [Period].[Segment].(count number of employees who have had >1 manager) ÷[Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].Manager-Churn-Percent}

****

Performance-Rating-Percent-of-Total-Distribution

Description: The distribution of performance ratings.

Calculation: [Period].[Segment].[Rating].Headcount-EOP ÷ [Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].Performance-Rating-Percent}

****

Performance-Appraisal-Participation-Percent

Description: The percentage of employees who have received a performance appraisal during the selected time period.

Calculation: [Period].[Segment].(count of employees with a performance appraisal) ÷ [Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].Performance-Appraisal-Participation-Percent}

****

Performance-Change-Percent

Description: The percentage of performance appraisal participants receiving a different rating (lower or higher) than the previous rating as a percentage of all receiving ratings.

Calculation: [Period].[Segment].(count of employee whose performance rating in current period does not equal performance rating in previous period ÷ [Period].[Segment].(count of employees with performance ratings for both time periods) × 100

Output Set: {[Period].[Segment].Performance-Rating-Change-Percent}

****

Performance-Improvement-Percentage

Description: The percentage of employees receiving a higher performance rating than their preceding review.

Calculation: [Period].[Segment].(count number of employees where performance rating in current period > performance rating in previous period ÷ [Period].[Segment].(count of employees with performance ratings for both time periods) × 100

Output Set: {[Period].[Segment].Performance-Rating-Increase-Percent}

****

Educational-Level-Percent-of-Headcount

Description: The percentage of headcount by educational attainment (high school, university, advanced degree).

Calculation: [Period].[Segment].[Education-Level].Headcount-EOP ÷ [Period].[Segment].Headcount-EOP × 100

Output Set: {[Period].[Segment].[Education-Level].Education-Level-Percent}

****

Learning-Hour-Investment-per-Employee

Description: The average number of formal learning and development hours per employee.

Calculation: [Period].[Segment].(sum of total hours of formal learning & development) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Learning-Hour-Investment-Per-Employee}

****

Learning-$-Investment-per-Employee

Description: The amount invested directly in employee learning and development for each headcount employee.

Calculation: [Period].[Segment].(sum of total learning and development expense) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Learning-Investment-Per-Employee}

****

Cost-of-Learning-as-Percent-of-Revenue

Description: The total cost of learning and development as a percentage of the total revenue from operations.

Calculation: (sum of total learning and development expense) ÷ (sum of total revenue) × 100

Output Set: {[Period].[Segment].Cost-of-Learning-Percent-Revenue}

****

Cost-of-Learning-as-Percent-of-Labor-Costs

Description: The total cost of learning and development as a percentage of the total labor costs.

Calculation: [Period].[Segment].(sum of total learning and development expense in USD) ÷ [Period].[Segment].Total-Compensation-USD × 100

Output Set: {[Period].[Segment].Cost-of-Learning-Percent-Labor-Cost}

****

[Course].Learning-Penetration-Percent

Description: The percentage of employees completing specific course or content training.

Calculation: [Period].[Segment][Course].(count of employees completing course) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].[Course].Learning-Penetration-Percent}

****

Company health

****

Human-Capital-ROI

Description: The pretax profit for each dollar invested in employee pay and benefits.

Calculation: (Revenue – (Total Cash Compensation Cost + Benefit Costs)) ÷ (Total Cash Compensation Cost + Benefit Costs)

Output Set: {[Period].HCROI}

****

Human-Investment-Ratio

Description: The ratio of operating profit, adding back total compensation expense, returned for every dollar invested in employee compensation and benefits.

Calculation: (Operating Profit + Total Compensation Cost) ÷ Total Compensation Cost

Output Set: {[Period].Human-Investment-Ratio}

****

Intangible-Asset-Value-per-FTE

Description: The average intangible market value per full-time-equivalent employee.

Calculation: (Market Capitalization – Book Value) ÷ FTE

Output Set: {[Period].Intangible-Asset-Value-Per-Employee}

****

Market-Capitalization-per-FTE

Description: The average market capitalization per full-time-equivalent employee.

Calculation: Market Capitalization ÷ FTE

Output Set: {[Period].Market-Cap-Per-FTE}

****

New-Products-and-Services-Revenue-per-FTE

Description: The average new products and services operating revenue per full-time-equivalent employee.

Calculation: (operating revenue from new products & services) ÷ FTE

Output Set: {[Period].New-Product-Revenue-Per-FTE}

****

Operating-Expense-per-FTE

Description: The average operating expense per full-time-equivalent employee.

Calculation: Operating Expense ÷ FTE

Output Set: {[Period].Operating-Expense-Per-FTE}

****

Operating-Profit-per-FTE

Description: The average operating profit (before tax, interest, and depreciation) per full-time-equivalent employee.

Calculation: Operating Profit ÷ FTE

Output Set: {[Period].Operating-Profit-Per-FTE}

****

Gross-Profit-per-FTE

Description: The revenue minus cost of goods sold per FTE.

Calculation: Gross Profit ÷ FTE

Output Set: {[Period].Gross-Profit-Per-FTE}

****

Operating-Revenue-per-FTE

Description: The average operating revenue per full-time-equivalent employee.

Calculation: Operating Revenue ÷ FTE

Output Set: {[Period].Operating-Revenue-Per-FTE}

****

Return-on-Human-Investment

Description: The operating profit returned for every dollar invested in employee compensation plus benefits.

Calculation: Operating Profit ÷ Total Compensation Expense

Output Set: {[Period].Return-Human-Investment}

****

Engagement-Index

Description: The average engagement index of employees.

REMEMBER

The engagement index is defined by responses to the Engagement Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of engagement index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-Engagement-Index}

****

Activation-Index

Description: The average activation index of employees.

REMEMBER

The activation index is defined by responses to the Activation Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of activation index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-Activation-Index}

****

Commitment-Index

Description: The average commitment index of employees.

REMEMBER

The commitment index is defined by responses to the Commitment Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of commitment index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-Commitment-Index}

****

Manager-Quality-Index

Description: The average manager quality index of employees.

REMEMBER

The manager quality index is defined by responses to the Manager Quality Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of manager quality index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-Manager-Quality-Index}

****

14-Day-Check-in-Index

Description: The average 14DCI index of employees.

REMEMBER

The 14DCI index is defined by response to the 14DCI Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of 14DCI Index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-14DCI-Index}

****

90-Day-Check-in Index

Description: The average 90DCI index of employees.

REMEMBER

The 90DCI index is defined by responses to the 90DCI Index questions on survey questionnaires.

Calculation: [Period].[Segment].(sum of 90DCI Index)÷ [Period].[Segment].(number of people who took the survey)

Output Set: {[Period].[Segment].Average-90DCI-Index}

****

Average-Grievances-per-Unionized-Headcount

Description: The total number of grievances as a percentage of total unionized headcount.

Calculation: [Period].[Segment].(count of the number of union employee grievances) ÷ [Period].[Segment].[Union].Average-Headcount-Sample

Output Set: {[Period].[Segment].Grievances-Percent-Union-Headcount}

****

Arbitrated-Grievances-Percent-of-Grievances-Open

Description: The total number of grievances gone to arbitration as a percentage of grievances open.

Calculation: [Period].[Segment].(count of the number of union grievances that went to arbitration) ÷ [Period].[Segment].(count of the number of union grievances) × 100

Output Set: {[Period].[Segment].Arbitrated-Grievances-Percent}

****

Grievances-Closed-Percent

Description: Grievances closed as a percentage of open grievances.

Calculation: [Period].[Segment].(count of the number of grievances closed) ÷ [Period].[Segment].(count of the number of union grievances) × 100

Output Set: {[Period].[Segment].Grievances-Closed-Percent}

****

Union-Headcount-Percent

Description: Employees belonging to a union as a percentage of headcount.

Calculation: [Period].[Segment].[Union].Average-Headcount-Sample ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Union-Headcount-Percent}

****

ADR-Percent

Description: The percentage of total internal grievances resolved that were settled through alternative dispute resolution (ADR) processes.

Calculation: [Period].[Segment].(Count of grievances resolved through ADR process) ÷ [Period].[Segment].(count of grievances resolved) × 100

Output Set: {[Period].[Segment].ADR-Percent}

****

External-Complaint-Factor

Description: The average number of complaints to external agencies recorded per employee.

Calculation: [Period].[Segment].(count of external agency complaints) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].External-Complaint-Factor}

****

Grievance-Percent

Description: The average number of grievances filed internally per employee.

Calculation: [Period].[Segment].(count of grievances filed) ÷ [Period].[Segment].Average-Headcount-Sample × 100

Output Set: {[Period].[Segment].Grievance-Percent}

****

Average-Grievance-Time-to-Resolve

Description: The average time required to satisfactorily resolve an employee grievance.

Calculation: [Period].[Segment].(sum of total days to resolve all grievances from start to end) ÷ [Period].[Segment].Grievances

Output Set: {[Period].[Segment].Average-Grievance-Time-To-Resolve}

****

Absence-Percent

Description: The total number of days of employee absence as a percentage of total expected workdays during the selected time period.

Calculation: [Period].[Segment].(sum of total absence days) ÷ [Period].[Segment].(sum of total expected work days) × 100

Output Set: {[Period].[Segment].Absence-Percent}

****

Average-Absence-Occurrence-per-Employee

Description: The average absence occurrence per employee.

Calculation: [Period].[Segment].(sum of absence occurrences) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Average-Absence-Occurrence-per-Employee}

****

Average-Unscheduled-Absence-Occurrence-per-Employee

Description: The average unscheduled absence occurrence per person.

Calculation: [Period].[Segment].(sum of unscheduled absence occurrences) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Average-Unscheduled-Absence-Occurrence-per-Employee}

****

Average-Cost-of-Absence-per-FTE

Description: The average direct labor cost per full-time-equivalent employee for time not worked due to illness.

Calculation: [Period].[Segment].Average-Total-Compensation-Per-FTE × [Period].[Segment].Average-Sick-Days-Per-FTE

Output Set: {[Period].[Segment].Average-Cost-Absences-Per-FTE}

****

Average-Sick-Leave-Days-per-FTE

Description: The average number of days that full-time-equivalent employees were absent due to illness during the selected time period.

Calculation: [Period].[Segment].(sum of total sick leave days) ÷ [Period].[Segment].FTE

Output Set: {[Period].[Segment].Average-Sick-Leave-Days-Per-FTE}

****

Lost-Time-Incident-Percent

Description: The percent of health-and-safety incidents that resulted in lost time.

Calculation: [Period].[Segment].(count of H&S incidents that resulted in lost time) ÷ [Period].[Segment].(count of H&S incidents) × 100

Output Set: {[Period].[Segment].Lost-Time-Incident-Percent}

****

PTO-Utilization-Percent

Description: The paid-time-off (PTO) hours taken as a percentage of those hours earned during the selected time period.

Calculation: [Period].[Segment].(Sum of PTO hours used) ÷ [Period].[Segment].(sum of PTO hours accrued) × 100

Output Set: {[Period].[Segment].PTO-Utilization-Percent}

****

Workers-Compensation-Cost

Description: The amount spent on workers' compensation costs in a selected time period.

Calculation: [Period].[Segment].(sum of total workers' compensation claims)

Output Set: {[Period].[Segment].Workers-Comp-Cost

****

Workers-Compensation-Cost-per-FTE

Description: The amount spent on workers' compensation costs per full-time-equivalent employee.

Calculation: [Period].[Segment].Workers-Compensation-Cost ÷ [Period].[Segment].FTE

Output Set: {[Period].[Segment].Workers-Comp-Cost-Per-FTE}

****

Workers-Compensation-Premium-Cost-per-FTE

Description: The workers' compensation premium paid per full-time-equivalent employee.

Calculation: [Period].[Segment].(sum of worker's compensation premium paid) ÷ [Period].[Segment].FTE

Output Set: {[Period].[Segment].Work-Comp-Premium-Cost-per-FTE}

****

Average-Time-Lost-per-H&S-Incident

Description: The average number of working days lost per health-and-safety incident.

Calculation: [Period].[Segment].(sum of working days lost to H&S incidents) ÷ [Period].[Segment].(count of H&S incidents)

Output Set: {[Period].[Segment].Average-Time-Lost-Per-Incident}

****

Average-Hour-Worked-per-Period-per-Employee

Description: The average number of hours worked per period per employee.

Calculation: [Period].[Segment].(sum of total hours worked) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Average-Hours-Per-Employee}

Human resources efficiency

****

HR-FTE-Ratio

Description: The number of full-time-equivalent employees per HR full-time-equivalent employee.

Calculation: [Period].[Segment].FTE ÷ [Period].[Segment].HR-FTE

Output Set: {[Period].[Segment].HR-FTE-Ratio}

****

Direct-HR-Cost-per-Employee

Description: The amount directly invested in the HR department for each head-count employee.

Calculation: [Period].[Segment].(sum of direct HR cost) ÷ [Period].[Segment].Average-Headcount-Sample

Output Set: {[Period].[Segment].Direct-HR-Cost-Per-Employee}

****

HR-Operating-Cost-Percent

Description: The HR expense as a percentage of all operating expenses.

Calculation: [Period].[Segment].(sum of direct HR cost) ÷ [Period].[Segment].(sum of total operating cost) × 100

Output Set: {[Period].HR-Operating-Cost-Percent}

****

HR-Staffing-Coverage-Ratio

Description: The number of total employees per HR employee.

Calculation: [Period].[Segment].Average-Headcount-Sample / [Period].[Segment].HR.Average-Headcount-Sample

Output Set: {[Period].HR-Staffing-Coverage-Ratio}

****

Payroll-Error-Percent

Description: The percentage of paychecks processed in which an error occurred.

Calculation: (count of payroll errors) ÷ (count of checks processed) × 100

Output Set: {[Period].Payroll-Error-Percent}

****

Payroll-Expense-per-Employee

Description: The average payroll expense (cost to run payroll) per employee.

Calculation: (sum of payroll expenses) ÷ Average-Headcount-Sample

Output Set: {[Period].Payroll-Expense-Per-Employee}

****

Self-Service-Penetration-Percent

Description: The number of HR transactions conducted via self-service as a percentage of the total number of HR transactions.

Calculation: [Period].[Segment].(number of HR transactions conducted via self-service) ÷ [Period].[Segment].(number of HR transactions) × 100

Output Set: {[Period].[Segment].Self-Service-Penetration-Percent}

****

Average-HR-Cost-per-Employee

Description: The dollar cost of human resources per employee.

Calculation: (sum of total HR expenses) ÷ Average-Headcount-Sample

Output Set: {[Period].Average-HR-Cost-Per-Employee}

****