About the HR Acuity Employee Relations Benchmark Study

Thank you for your participation in the HR Acuity Employee Relations Benchmark Study. As a thank you for your participation, you will gain access to the results prior to their broad release PLUS get copies of industry and size specific breakdowns of the aggregated data.

Below is some information about the Study that will be helpful for you to review before you begin.

- **You may find that you need to gather information from several resources within your organization. To assist you with gathering data, you may download a printed copy of the study here.**
- **Your responses will save as you go through the survey. If you are unable to complete the Study in one sitting, you can return to finish at another time.**
- **If you would prefer to submit your responses manually, please contact us at benchmark@hracuity.com.**

Responses must be submitted by August 30, 2018 to be included in the Study.
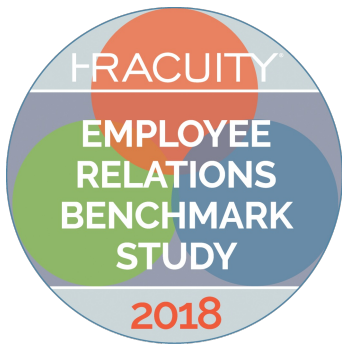
Benchmark Study Methodology

- **This Study targets participants from medium to enterprise-sized organizations (1,000+ employees) across a wide range of industries.**
- **The primary focus of the Study is on practices within the US with a small set of questions related to global employee relations practices.**
- **A questionnaire containing both quantitative and qualitative questions will be the primary tool used for collecting data; however, follow-up interviews may be done for further clarification.**
- **Only one questionnaire per organization will be collected. All responses will**

remain confidential. No attribution to any organization or participant will be included in the Study results.

If you have any questions about the Study, please email us at benchmark@hracuity.com or call 888-598-0161.

A Special Thank You to the HR Acuity Employee Relations Roundtable Members
We would like to thank the members of the HR Acuity Employee Relations Benchmark Advisory Board for providing their time and insightful expertise toward study and question development. The Benchmark Advisory Board consists of members from the HR Acuity Employee Relations Roundtable community, which is made up of senior employee relations leaders from enterprise organizations seeking to connect, collaborate and share practices and process with regard to Employee Relations. For more information on how to become a member of the HR Acuity Employee Relations Roundtable community, please contact us at roundtable@hracuity.com.

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EMPLOYEE RELATIONS BENCHMARK STUDY
2018

Participant Information

* 1. Organization Name

* 2. First Name

* 3. Last Name

* 4. Title

* 5. Email Address
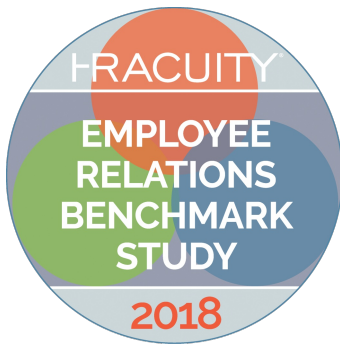
* 6. Phone Number

* 7. Address 1

8. Address 2

* 9. City

* 10. State

* 11. Zip Code

Your Organization

* 12. Please select the industry that best describes your organization:

◯ Consumer Services

◯ Education (Higher Education)

◯ Education (K-12)

◯ Energy or Utilities

◯ Financial Services or Insurance

◯ Government or Public Sector

◯ Healthcare or Hospitals

◯ Hospitality or Food & Beverage

◯ Manufacturing, Distribution or Construction

◯ Media or Entertainment

◯ Pharmaceuticals or Medical Devices

◯ Professional or Business Services

◯ Retail or Wholesale

◯ Technology

◯ Other (please specify)

* 13. Is your organization classified as:

○ Public

○ Private

○ Government

○ Nonprofit

* 14. What is your organization's annual revenue? If your organization is a non-profit, please indicate your yearly budget.

○ <$100 million

○ $101 million to $999 million

○ $1B - $5B

○ $5.1B - $10B

○ >$10B

* 15. Is your organization:

○ Global

○ Primarily US-based, but some regional presences

○ US-based only

* 16. How large is your organization globally (number of employees)?

○ Less than 1,000 employees

○ 1,000 - 3,499

○ 3,500 - 9,999

○ 10,000 - 19,999

○ 20,000+

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Your Employees

Tell us about your employees.

* 17. What is the total number of both full and part-time employees (not including contingent workers) in your organization **WITHIN THE US**? Please round to the nearest 500.

[   ]

* 18. What is the total number of both full and part-time employees (not including contingent workers) in your organization **OUTSIDE THE US**? Please round to the nearest 500 or enter "Not applicable" if you do not have employees outside the US.

[   ]

* 19. Does your organization have collective bargaining units?

◯ Yes - US only

◯ Yes - Outside the US only

◯ Yes - In different global regions including the US

◯ No

Your Resources for Employee Relations and Human Resources

Tell us about who manages your employee relations issues. Please answer all questions for the US only.

* 20. How many Employee Relations Professionals (FTE) are employed by your organization in the US? *For the purposes of this study, Employee Relations Professionals should refer to those individuals who are dedicated to managing or working on employee relations matters.*

[   ]

* 21. Describe your expectations for the number of Employee Relations Professionals (FTE) over the next 12 months.

( ) I expect the number of Employee Relations Professionals (FTE) to increase.

( ) I expect the number of Employee Relations Professionals (FTE) to decrease.

( ) I expect the number of Employee Relations Professionals (FTE) to remain the same.

( ) Unsure

* 22. How many HR Business Partners or Generalists (FTE) are employed by your organization in the US? *For the purposes of this study, HR Business Partners or Generalists should refer to those individuals who provide strategic or operational human resources support to the business or functional areas. Employee Relations may be part of their responsibilities.*

[   ]

* 23. Describe your expectations for the number of HR Business Partners or Generalists (FTE) over the next 12 months.

( ) I expect the number of HR Business Partners or Generalists (FTE) to increase.

( ) I expect the number of HR Business Partners or Generalists (FTE) to decrease.

( ) I expect the number of HR Business Partners or Generalists (FTE) to remain the same.

( ) Unsure

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Resources - Employee Relations and Human Resources continued

* 24. How many in-house lawyers (FTE) are dedicated to labor and employment matters in your organization (do not include Employee Relations Professionals who may have a legal background but are not practicing as such for your organization)?

[   ]

* 25. Describe your expectations for the number of in-house lawyers (FTE) over the next 12 months.

( ) I expect the number of in-house lawyers (FTE) to increase.

( ) I expect the number of in-house lawyers (FTE) to decrease.

( ) I expect the number of in-house lawyers (FTE) to remain the same.

( ) Unsure

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SPECIAL SECTION - #MeToo

This year's Special Topic is designed to gather information about how organizations are responding to #MeToo.

* 26. Since #MeToo went viral in November, 2017, have you experienced a change in volume in **sexual harassment allegations** made by employees in your organization?

Significant Increase	Some increase	About the same as before #MeToo	Some Decrease	Significant Decrease	Unsure
◯	◯	◯	◯	◯	◯

* 27. Since #MeToo went viral in November 2017, have you experienced a change in volume in **other harassment (non-sexual) allegations** made by employees in your organization?

Significant Increase	Some Increase	About the same as before #MeToo	Some Decrease	Significant Decrease	Unsure
◯	◯	◯	◯	◯	◯

* 28. How do you expect the number of harassment allegations (sexual and non-sexual) to trend in the next 12 months?

◯ More allegations expected

◯ About the same number of allegations expected

◯ Fewer allegations expected

◯ Unsure

* 29. Which statement best describes your organization's reaction to #MeToo?

◯ We have developed a specific strategic initiative/plan to address #MeToo.

◯ We have made or have plans to make some improvements/changes to existing programs and processes.

◯ No change to what we were doing prior to #MeToo.

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SPECIAL SECTION - #MeToo continued

* 30. Please indicate specific changes that have been made since #MeToo went viral.

	Initiated or Enhanced since #MeToo	Planned changes in next 12 months	Maintaining current program - no changes planned	Not currently done or planned
Investigation Processes	○	○	○	○
Required Investigation Processes	○	○	○	○
Mechanisms for Reporting Sexual Harassment	○	○	○	○
Sexual Harassment Training for Executive Leaders on Addressing Complaints	○	○	○	○
Sexual Harassment Training for Managers	○	○	○	○
Sexual Harassment Training for Employees	○	○	○	○
Investigation Skills Training	○	○	○	○
Unconscious Bias Training	○	○	○	○
Bystander Training	○	○	○	○
Communications from Leadership Specifically Addressing #MeToo	○	○	○	○
Sexual Harassment Policies	○	○	○	○
Tracking Metrics Related to Harassment Incidents	○	○	○	○
Publishing Metrics on Harassment Incidents	○	○	○	○

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SPECIAL SECTION - #MeToo continued

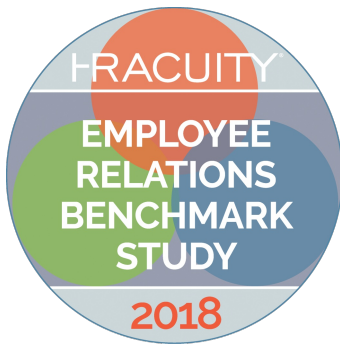* 31. Who is leading or championing the new or improved initiatives around #MeToo?

○ Board of Directors

○ CEO

○ Chief HR Officer

○ Head of Diversity and Inclusion

○ General Counsel

○ Director of Employee Relations

○ Business Leaders

○ Other (please specify)

[   ]

32. Please provide specifics about programs or changes that have been initiated in response to #MeToo in your organization.

[   ]

33. How will you measure the success or impact of your programs/changes?

[   ]

34. Are these programs being rolled out globally or just in the US? Please explain.

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SPECIAL SECTION - #MeToo continued

* 35. Does your organization require US employees to sign arbitration agreements as a term of employment?

◯ Yes, some

◯ Yes, all

◯ No

* 36. Have you changed your approach to arbitration agreements post #MeToo?

◯ Yes

◯ Considering changes

◯ No

If Yes, please tell us what has changed.

Your Organizational Model for Managing Employee Relations

Please provide us with information on how your organization is designed to manage employee relations matters. These questions relate to the US only.

* 37. Which statement best describes your current employee relations model in the US?

○ **CENTRALIZED**: There is a centralized team of Employee Relations Professionals or Center of Excellence ("COE") responsible for managing employee relations issues and conducting investigations across the organization. (Note this group does not have to be geographically centralized)

○ **MIXED**: There is a centralized group for managing some or most of the employee relations cases and investigations but field resources (HR Generalists, Business Partners and/or managers) still manage some employee relations issues.

○ **DECENTRALIZED**: Employee relations issues are managed within the specific lines of business by HR Generalists, Business Partners or Employee Relations Professionals. Employee Relations matters are not centralized.

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Decentralized Model for Managing Employee Relations

* 38. In the US, to whom do these roles or functions directly report?

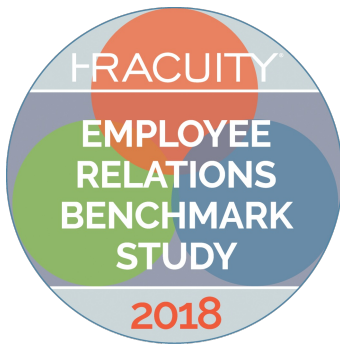|	Line of Business	Corporate HR	Shared Services	Legal	Compliance	Not Applicable
Human Resource Business Partners/Generalists	○	○	○	○	○	○
Employee Relations Professionals	○	○	○	○	○	○

* 39. On average, how many employee relations cases are managed by each HR Business Professional or Employee Relations Professional at any one time? (e.g. consultations, inquiries, investigations)

	<5	6 - 10	11 - 25	26 - 35	36+
Human Resource Business Partners/Generalists	○	○	○	○	○
Employee Relations Professionals	○	○	○	○	○

* 40. Is your organization considering moving to a mixed or centralized or Center of Excellence (COE) model in the future?

○ Yes within the next 12 months

○ Under consideration for the future

○ No current plans to change model

Centralized or Mixed Organizational Models for Managing Employee Relations

* 41. To what area or to whom does the centralized ER team report?

◯ CHRO (or Head of HR)

◯ Shared Services

◯ VP of HR (Director level)

◯ Legal

◯ Compliance

◯ Other (please specify)

[   ]

* 42. Within your centralized ER team, do your Employee Relations Professionals work:

◯ In a singular corporate center

◯ In different geographic locations

◯ Mixed. Some portion of the team is centralized while others work in decentralized locations

* 43. What is the primary method used for assigning cases within the centralized ER team?

○ By case type (e.g. investigations, performance, etc.)

○ By subject matter (e.g. harassment, ADA, etc.)

○ By line of business

○ By complexity

○ Auto-assigned

○ Geographically assigned

○ First In, First Out

○ Other

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Centralized or Mixed: Caseload by Case Type

* 44. For Employee Relations Professionals (ERP) that **only conduct investigations**, please indicate approximately how many investigations each ERP conducts at one time.

<3	4 - 6	7 - 10	10+
◯	◯	◯	◯

* 45. For Employee Relations Professionals (ERP) that **manage employee relations issue (including performance) but do not conduct investigations,** please indicate approximately how many issues each ERP handles at one time.

<5	6 - 10	11 - 25	26-35	36+
◯	◯	◯	◯	◯

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Centralized or Mixed Organizational Model for Managing Employee Relations continued

* 46. On average, how many employee relations issues are assigned to each Employee Relations Professional at any given time? *(e.g., consultations, inquiries, coaching, investigations)*

○ <5

○ 6 to 10

○ 11 to 25

○ 26 - 35

○ 36+

○ Don't know

Centralized or Mixed Organizational Model for Managing Employee Relations continued

* 47. Please indicate which of the following type of cases generally fall within the scope of your centralized ER team. (Choose all that apply):

☐ General Policy Inquiries that are answered based upon standard operating procedures

☐ Performance Issues (e.g., performance counseling or discussion with employee, performance advising to manager/supervisor, performance documentation, etc.)

☐ Behavioral Issues (e.g., unprofessional conduct, inappropriate behavior, bullying, insubordination, conflicts between co-worker, etc.)

☐ Policy Violations - NON ATTENDANCE RELATED (e.g., inappropriate use of social media, electronic communications, code of conduct, confidentiality, theft, fraud, substance abuse, etc.)

☐ Time and Attendance Issues

☐ Leave Management Issues (e.g., FMLA, Disability, Jury, Military, PTO, etc.)

☐ Accommodations

☐ Investigations into Allegations of Discrimination/Harassment/Retaliation (not including any outside charges, e.g., EEOC or other administrative agency or legal inquiry, etc.)

☐ Investigations into Outside Agency or Party Charge (e.g., EEOC or other Administrative Charges, etc.)

☐ Grievances

☐ Terminations - Involuntary

☐ Terminations - Mutual

☐ Reductions in Force

* 48. What additional functions are managed by the centralized ER team. (Choose all that apply)?

☐ Affirmative Action

☐ Alternative Dispute Resolution

☐ Employee Relations Analytics

☐ Engagement Initiatives

☐ Exit Surveys

☐ OSHA

☐ Policy Development or Benchmarking

☐ Policy Oversight/Governance

☐ Pro-active Employee Relations Training

☐ Required Employee Relations Training (e.g. Harassment, Code of Conduct, etc.)

☐ Union Avoidance Activities

☐ Labor Negotiations

☐ None

☐ Other (provide details)

[   ]

* 49. Does your centralized ER team use Service Level Agreements (SLAs)?

○ Formal SLAs in place

○ Informal guidelines in place
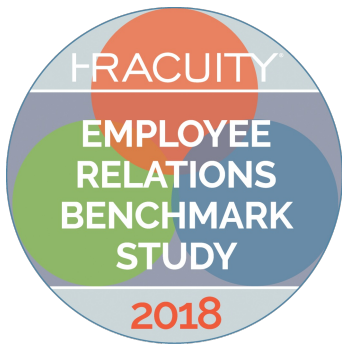
○ No SLAs used

Organizational Model - SLAs

* 50. Please indicate what is measured related to your SLAs and the associated time frames.

	same day	w/in 24 hrs (or 1 business day)	2-3 days	<1 week	1 - 2 weeks	2 - 4 weeks	4+ weeks
Response Time	○	○	○	○	○	○	○
Time to Close	○	○	○	○	○	○	○
Time to Resolution	○	○	○	○	○	○	○

Please provide any additional comments about your SLA measurements and process.

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Organizational Model for Managing Employee Relations continued

51. Describe the biggest benefits of the organizational model you are using?

52. Describe the challenges faced with your current organizational model.

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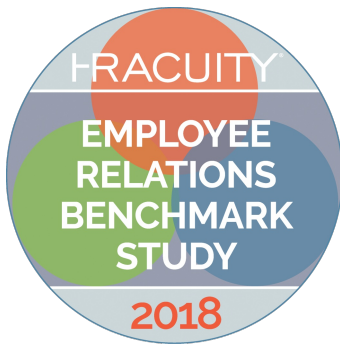
Staffing: Employee Relations Competencies

This section asks questions about the experience level and skills you seek when hiring Employee Relations Professionals. Employee Relations Professionals refer to those individuals who are dedicated to managing or working on employee relations matters.

* 53. When hiring Employee Relations Professionals for your organization, what prior experience do you find most valuable? Please rank the following.

⠿	⬍	Prior HR Business Partner Experience
⠿	⬍	Legal Experience
⠿	⬍	Prior Employee Relations Experience
⠿	⬍	Prior Managerial Experience

* 54. When hiring Employee Relations Professionals, how many years of previous employee relations experience do you require?

◯ No experience

◯ 1 - 3 years

◯ 3 - 5 years

◯ 5+ years

◯ Yeas of experience is not a factor in decision making

Staffing: Employee Relations Competencies continued

* 55. When hiring Employee Relations Professionals, what skills are important for successful candidates? Please rank the following.

		Investigation/Fact-Finding Skills

		Writing Skills

		Influencing Skills

		Communication Skills

		Program/Project Management

		Consulting Skills

* 56. When hiring Employee Relations Professionals, what educational requirements do you have?

	Required	Preferred	No preference	Not preferred
Bachelors Degree	○	○	○	○
Advanced Degree	○	○	○	○
Law Degree	○	○	○	○

* 57. Where have you had the best success sourcing qualified Employee Relations Professionals? (Choose all that apply)

☐ Recruiter

☐ Internal Posting

☐ Professional or Personal Network

☐ LinkedIn

☐ Job Boards

☐ Professional Associations (SHRM, etc.)

☐ Other (please specify)

[ ]

58. Please provide any additional comments about sourcing and hiring employee relations professionals.

[ ]

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Case Management

The following questions relate to managing cases for employee relations and investigations.

* 59. What method best describes how investigations in the U.S. are conducted within your organization?

○ Our organization has a required process including forms and templates for conducting investigations.

○ Our organization provides suggested/sample forms and templates for conducting investigations, but these are not required.

○ There are no specific guidelines or processes for conducting investigations.

Comments

* 60. How often are investigators trained on proper investigation techniques?

○ Annually

○ Every two years

○ As needed

○ No formal training/rely on experience

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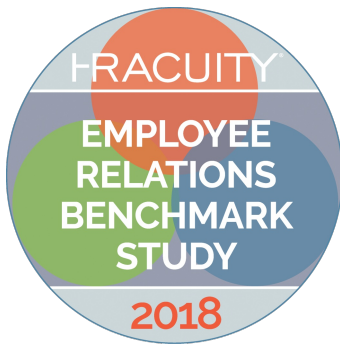RELATIONS
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Case Management continued

* 61. How does your organization primarily store documentation created as a result of an employee relations issue or investigations in the US?

◯ HRBP or ER Professional maintains their own documentation.

◯ Documents are uploaded and stored on a shared drive.

◯ Documents are sent to a centralized HR team for filing.

◯ Mixed. Some combination of personal storage, shared drive, central filing or case management system.

◯ Documents are stored in a case management system.

* 62. How does your organization primarily track employee relations issues and investigations in the US? (Choose all that apply)

◯ Excel spreadsheets or similar

◯ Access, Sharepoint or similar database

◯ Employee Relations Case Management system (e.g. HR Acuity)

◯ Generic Case Management System (e.g., Salesforce.com, ServiceNow, etc.)

◯ Hotline Case Management System (e.g., EthicsPoint, Navex, etc.)

◯ HRIS (e.g., Oracle, Workday, ADP, Ultimate, etc.)

◯ Don't Track

Other (provide details)

[   ]

Technology

* 63. Does your organization plan on transitioning to an employee relations/HR case management system?

  ◯ Yes, within the next 12 months

  ◯ Yes, in the future (greater than 12 months)

  ◯ No plans for transitioning

Technology

The following questions the technology you use for managing your employee relations.

* 64. What specific technology platform does your organization use for employee relations case management in the US?

* 65. Does your organization plan on switching to another employee relations case management system?

- ◯ In the next 12 months
- ◯ In the future (greater than 12 months)
- ◯ No plans for transitioning

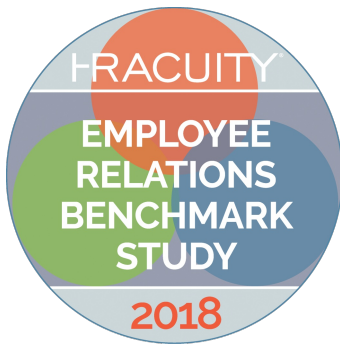66. How have you most effectively used this technology to proactively manage the workforce?

Issue Trends

In this section, please share trends in volume of issues your US based organization has experienced in the last 12 months.

* 67. Over the past 12 months, have you experienced a change in volume in the following types of employee-related issues or allegations made by employees within your organization? (Please select one choice for each category.)

NOTE: Harassment volume is covered in the #MeToo section.

	Significant Increase	Some Increase	About the same as prior 12 month period	Some Decrease	Significant Decrease
Job Performance	○	○	○	○	○
Unprofessional Conduct/Policy Violations	○	○	○	○	○
Discrimination (e.g., Age, Disability, Gender, Race, Religion, etc.)	○	○	○	○	○
Retaliation	○	○	○	○	○
Workplace Bullying	○	○	○	○	○
Theft/Fraud	○	○	○	○	○
Social Media Issues	○	○	○	○	○
Wage and Hour Disputes	○	○	○	○	○
Substance Abuse	○	○	○	○	○
Workplace Violence	○	○	○	○	○
Union Organizing Attempts	○	○	○	○	○
Accommodation Requests	○	○	○	○	○

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Issue Trends continued

* 68. To what would you attribute any increase in employee-related events/issues over the last year? (Choose all that apply)

☐ Organizational changes

☐ The economy

☐ The political environment

☐ #MeToo

☐ Increased awareness of regulations

☐ Increased awareness of perceived rights

☐ Increased business expectations

☐ Broader use of and/or availability of technology

☐ Unsure

☐ No increase

☐ Other (please specify)

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To help benchmark the frequency of issues that are handled by organizations, please provide information on the number of issues your organization manages in the US on an annual basis. If available, please use FY 2017 data or best approximation.

Approximately how many of each of these types of issues does your organization manage annually?

* 69. **Performance Issues** (e.g., Performance Counseling or Discussion with employee, Performance Advising or Coaching with manager or supervisor, Performance Documentation, Performance Employee Rebuttal etc.)

[   ]

* 70. **Behavioral Issues** (e.g., Unprofessional Conduct, Inappropriate Behavior, Bullying, Insubordination, Conflicts between co-workers, etc.)

[   ]

* 71. **Policy Violations** (e.g., Inappropriate use of Social Media, Workplace Violence, Electronic Communication, Code of Conduct, Confidentiality, Theft, Fraud, Falsification, Attendance, Substance Abuse, etc.)

[   ]

* 72. **Leave Management Issues** (e.g. FMLA, Disability, Jury, Military, PTO, etc.)

[   ]

* 73. **Allegations of Discrimination/Harassment/Retaliation** (not including any EEOC or administrative charges)

[ ]

* 74. **EEOC/Administrative Charges**

[ ]

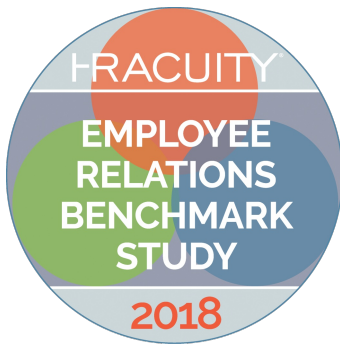* 75. **Accommodations** (e.g. ADA, Religious, Gender, Interactive Discussions, etc.)

[ ]

* 76. **Terminations - Voluntary or Mutual**

[ ]

* 77. **Terminations - Involuntary**

[ ]

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Performance Management and Termination Practices

In the next section of the Study, you will be answering questions related to specific performance management and termination practices.

Performance Management & Terminations continued

The following questions relate to your organization's practices regarding probationary periods for new hires.

* 78. Indicate whether your organization uses probationary periods to manage performance for new hires and if yes, the length of the probationary period.

	1-30 Days	31-60 Days	61-90 Days	>90 Days	Not Used
All Employees	◯	◯	◯	◯	◯
Some Employees	◯	◯	◯	◯	◯
Exempt Employees	◯	◯	◯	◯	◯
Non-exempt Employees	◯	◯	◯	◯	◯
Other	◯	◯	◯	◯	◯

Other (please specify)

79. Please describe your process for documenting terminations that occur during the probationary period.

"PIP or Package"

Recently, members of our Employee Relations Roundtable Community started a discussion about the practice of offering severance in lieu of a Performance Improvement Plan (PIP) - "PIP or Package." To more broadly assess the use of this option, we have included a series of related questions.

* 80. When employees are underperforming do you off the option of "PIP or Package"?

◯ Yes

◯ No

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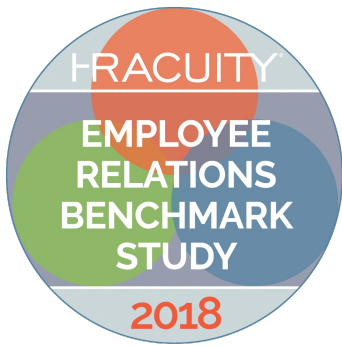RELATIONS
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"PIP or Package" continued

81. Describe the disciplinary steps that must be taken before this option is presented to an employee.

* 82. When offering and employee the "PIP or Package" option, how is the amount of severance (aka, the package) determined?

○ Set amount of time for all employees equal in length to the PIP time period (for example, if PIP were 30 days, "package" severance would be 30 days)
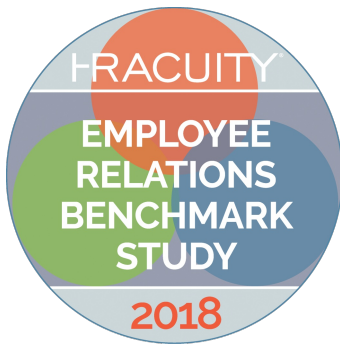
○ Set amount of time for all employees that is greater than the PIP time period (for example, if PIP were 30 days, "package" severance would be greater than 30 days, etc.)

○ Based on length of service

○ Based on Role/level

○ Based upon reason for termination

○ Combination of the above

○ Other (please specify)

"PIP or Package" continued

* 83. How does the amount of severance offered in a "PIP or Package" scenario differ from severance offered for non-performance related terminations?

◯ It is the same.

◯ It is less than what we provide for non-performance related terminations

◯ It is more than what we provide for non-performance related terminations

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"PIP or Package" continued

* 84. Approximately what percentage of employees choose the "package" option?

○ <10%

○ 11 - 25%

○ 26 - 50%

○ >50%

○ Don't track

* 85. How long do you give employees to decide on the option of PIP or Package?

○ 24 hours

○ 48 hours

○ 1 week

○ > 1 week

○ No definite time period

○ Other (please specify)

Terminations and Severance Practices

The following questions relate to termination and severance practices.

* 86. In general, who typically participates in a termination discussion with a non-executive employee? (Choose all that apply)

	Manager	HR Business Partner/Generalist	Employee Relations Professional	In-house Legal Counsel
Involuntary Termination due to Organization Change (e.g., RIF, downsizing, etc.)	☐	☐	☐	☐
Involuntary Termination due to Performance	☐	☐	☐	☐
Involuntary Termination due to Misconduct	☐	☐	☐	☐

* 87. Under what circumstances do you generally pay severance in the US? (Choose all that apply)

☐ Involuntary terminations - Performance Related

☐ Involuntary termination - Non-performance Related

☐ Involuntary termination - For Cause

☐ Job elimination/RIF

☐ Mutual

* 88. How is the amount of **a non-performance related severance package** determined?

- ( ) Not offered
- ( ) Set amount of time for all employees (e.g., two months, etc.)
- ( ) Based on length of service
- ( ) Based on role/level
- ( ) Based on reason for termination
- ( ) Combination of the above

* 89. How is the amount of **a performance-related severance package** determined?

- ( ) Not offered
- ( ) Set amount of time for all employees (e.g. two months, etc.)
- ( ) Based on length of service
- ( ) Based on role/level
- ( ) Based on reason for termination
- ( ) Combination of the above

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Terminations and Severance continued

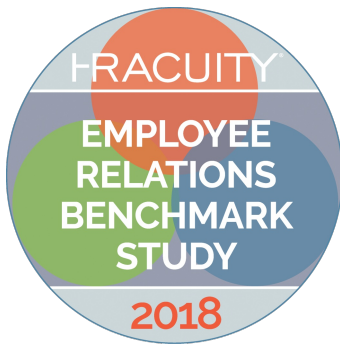* 90. Do you require a general release in consideration for severance?

◯ Yes, always

◯ Only for non-performance related terminations

◯ Only for performance related terminations

◯ No releases required

* 91. Do you require a general release in consideration for severance when terminating an employee due to a reorganization?

◯ Yes

◯ No

Comments

[   ]

Exit Interviews

The following questions relate to the use of exit interviews.

* 92. What methods do you most frequently use to conduct exit interviews?

○ Online

○ Phone

○ In person

○ We don't conduct exit interviews

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Exit Interviews continued

* 93. Who conducts exit interviews?

- ◯ HRBP or Generalist
- ◯ Employee Relations Professional
- ◯ HR Call Center or Shared Services
- ◯ Manager
- ◯ External/outsourced
- ◯ Other (please specify)

* 94. What is your approximate completion rate for all exit interviews sent out to exiting employees?

- ◯ <10%
- ◯ 11 - 20%
- ◯ 21 - 30%
- ◯ 31 - 40%
- ◯ 41 - 50%
- ◯ 51%+

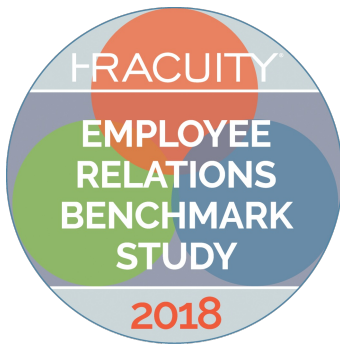95. Describe how you are using exit interview data.

Metrics & Analytics

The next section of the Study focuses on the use of metrics and analytics within the Employee Relations function.

96. Do you track employee relations and investigation data?

◯ Yes

◯ No

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Metrics & Analytics continued

* 97. Please indicate employee relations data your organization currently tracks. (Choose all that apply)

☐ Issue Type (e.g. harassment, discrimination, policy violation, etc.)

☐ Issues by Department/Function

☐ Issues by Location

☐ Cases by Manager

☐ Issue Disposition (e.g. substantiated, unsubstantiated, etc.)

☐ Remedial Action Taken

☐ Case Aging

☐ Time to Close (average # of days)

☐ Trends over Time

☐ Method of Notification

☐ Associated Expenses

☐ Employee History

☐ Time to Conduct Investigation/Time Spent by HR

☐ Other (please specify)

98. What other employee relations data do you track?

* 99. To whom in your organization do you report metrics related to employee relations activities? (Choose all that apply)

☐ Board

☐ Senior Leadership (C-Suite)

☐ Managers

☐ Human Resources

☐ Legal

☐ Compliance

☐ Diversity and Inclusion

☐ Other (please specify)

[   ]

* 100. Who in your organization receives or has access to aggregate reporting for investigation data? (Choose all that apply)

☐ Senior Leadership (C-Suite)

☐ HR Leaders

☐ Business Managers

☐ Supervisor

☐ Legal

☐ Compliance

☐ Operations

☐ Security

☐ Other (please specify)

[   ]

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Metrics & Analytics continued

* 101. What other data do you integrate with employee relations data for further analysis? (Choose all that apply)

- [ ] Employee Demographics (e.g. gender, age, race, etc.)
- [ ] Performance Ratings
- [ ] Turnover
- [ ] Business Performance
- [ ] Compensation
- [ ] Engagement Scores
- [ ] None
- [ ] Other (please specify)

* 102. With what other departments/functions do you incorporate or combine employee relations data? (Choose all that apply)

- [ ] Audit
- [ ] IT
- [ ] Legal
- [ ] Compliance
- [ ] Security
- [ ] None
- [ ] Other (please specify)

* 103. How are metrics and data gathered currently used within your organization? (Choose all that apply)

- [ ] Used to construct predictive models of employee behavior
- [ ] Obtained for more data-driven employee insights and initiatives
- [ ] Utilized to create better ER policies
- [ ] Gathered, but not really used
- [ ] Other (please specify)

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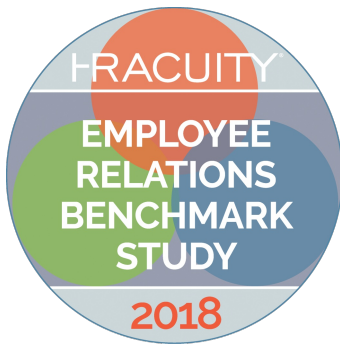
Metrics & Analytics continued

104. Please share examples and best practices of how you are using employee relations analytics.

* 105. Are you using or do you have plans to use employee relations data for predictive analytics or incorporate with some type of artificial intelligence (AI)? Please provide details.

◯ Yes

◯ No

If Yes, Please share details.

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Reasons for Lack of Tracking/Analytics

* 106. What are the reasons you are not using employee relations metrics and analytics? (Choose all that apply)

- [ ] Poor data quality

- [ ] Lack of skills/competencies in data and data platforms

- [ ] No investment from management

- [ ] No tracking mechanism

- [ ] No time/Too busy

- [ ] Not requested from leadership

- [ ] Other (please specify)

Global Employee Relations

While the majority of the Study is focused on US employee relations practices, many of our participants are interested in learning more about global employee relations practices.

* 107. Are you interested in answering a few more questions regarding global employee relations?

◯ Yes, that would be great!

◯ No thank you!

Global Employee Relations continued

Global Employee Relations Practices continue to be of great interest to many organizations and our participants. Below you will find a few questions regarding best practices across different regions.

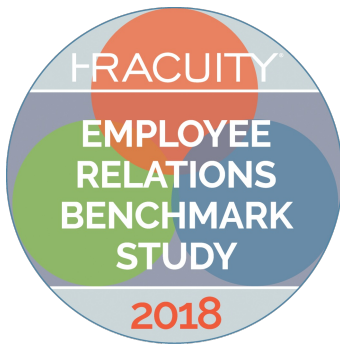* 108. Choose the description that best describes your current employee relations model within each region.

Employee Relations Model

Canada	⬍
Mexico and Central America	⬍
South America	⬍
EMEA (Europe, Middle East & Africa)	⬍
ASPAC (Asia Pacific)	⬍

* 109. Choose the method best describes how investigations are typically conducted within each region.

Most Typical Investigation Practice

Canada	⬍
Mexico and Central America	⬍
South America	⬍
EMEA (Europe, Middle East & Africa)	⬍
ASPAC (Asia Pacific)	⬍

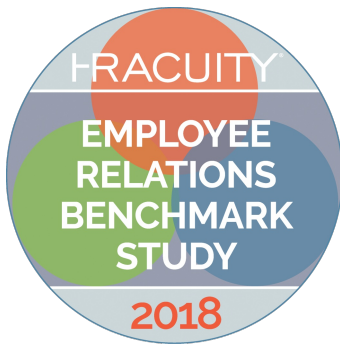## Copy of page: Global Employee Relations continued

* 110. Choose the method that best describes how each region tracks employee relations issues and investigations.

Primary method for tracking issues and investigations

Canada	⬍
Mexico and Central America	⬍
South America	⬍
EMEA (Europe, Middle East & Africa)	⬍
ASPAC (Asia Pacific)	⬍

* 111. Please indicate in which regions you offer PIP or Package outside the US? (Choose all that apply)

☐ Canada

☐ Mexico and Central America

☐ South America

☐ EMEA (Europe, Middle East & Africa)

☐ APAC (Asia Pacific)

☐ None (US only)

112. Please provide any additional information about how employee relations are managed globally within your organization.

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Thank you for participating!

113. Is there any additional information about how your organization manages employee relations that you would like to share?

114. Are there other questions you would like us to explore in future employee relations benchmark studies? (Many of the new questions this year were generated directly from participant input!)

* 115. May we contact you to get additional information or clarification to your responses?

◯ Yes

◯ No

116. Please let us know of other leaders of employee relations within your professional network who may be interested in participating in our Employee Relations Roundtable Community initiatives (including the Benchmark Study). Please provide name, organization and email if available.

Thank you for taking the time to complete this study. We look forward to compiling and sharing the results with participating organizations. As a reminder, all responses will be aggregated to maintain the confidentiality of participating organizations.

Please let us know if we may contact you to discuss any of your responses in more detail. This will help ensure the accuracy of the results.

Thank you again! If you have any questions, please contact us at benchmark@hracuity.com.