

## Introduction

Findley Davies is evaluating how organizations deliver HR services and we would like your input on a few critical benchmarks.

In return, you will receive a summary of the survey results which can be used to gain insight into how other organizations are delivering HR services. This information will be helpful if you are considering a shift in service delivery or are simply interested in comparing what your organization is doing to what other organizations are doing.

Please take 15-20 minutes to complete this survey and know that your individual responses will remain confidential. Please note, you can begin the survey and re-enter at any time before June 12 to update your responses. We would like all responses by Friday, June 12, 2015.

Thank you for your time to advance the excellence of the HR function. If you have any questions about this survey, please contact Lisa Kay at 216-875-1946 or [lkay@findleydavies.com](mailto:lkay@findleydavies.com).

## Demographics

**1. Name (optional)**

**2. Title**

**3. Organization (optional)**

**4. Email Address (required to receive survey results)**

**\*5. Industry**

- ☐ Health care
- ☐ Manufacturing
- ☐ Financial
- ☐ Education
- ☐ Professional Services
- ☐ Government
- ☐ Non-Profit
- ☐ Other

**\*6. How many FTEs in your organization?**

## HR Staffing Information

### \* 7. How many HR staff members do you have in your organization?

### 8. How are your HR staff members categorized? (Your total should equal your answer in question #7)

# of FTEs

# of Part-time employees

# of Contingent employees

# of Contract employees

### 9. How are your HR staff members categorized by level? (Your total should equal your answer in question #7)

# of VPs

# of Directors

# of Managers

# of Supervisors

# of Team Leads

# of Specialists

# of Business partners

# of Generalists

# of Analysts

# of Coordinators

# Administrative support

Other

## Technology

**10. What is the primary software application that you use for each of the following HR processes? For example, if you use Taleo for performance management, Taleo would go in the box next to Performance Management. If you use an Excel spreadsheet to manage your learning and development initiatives, then Excel would go in the box for Learning and Development. If you don't use any software to enable you to manage a process, enter the word None.**

Workforce Planning (Developing and executing people strategies for the future)	<input type="text"/>
Organizational Development (Organization wide initiatives (e.g., culture, M&A, restructuring))	<input type="text"/>
Recruitment and Selection (Filling today's open positions (includes relocation efforts))	<input type="text"/>
Onboarding	<input type="text"/>
Performance Management	<input type="text"/>
Learning & Development	<input type="text"/>
Succession Planning & Leadership Development	<input type="text"/>
Employee & Labor Relations (Answering policy questions, negotiating contracts and handling employee issues/complaints)	<input type="text"/>
Exit Management (Managing voluntary and involuntary separations)	<input type="text"/>
Retirement (Strategy & administration of all benefit programs excluding H&W)	<input type="text"/>
Compensation (Strategy & administration of all compensation plans)	<input type="text"/>
Information Management (Strategy & administration of HRIS)	<input type="text"/>
Payroll and Time Collection (Strategy & administration of payroll and time and attendance)	<input type="text"/>
Compliance & Risk Management (Administration of all Federal, State, and local reporting)	<input type="text"/>
Other (Software used by HR staff members outside of these processes)	<input type="text"/>

**11. Do you have plans to implement or upgrade to new HR technology?**

- ☐ Yes, in the next 0 - 1 years
- ☐ Yes, in the next 2 - 3 years
- ☐ Yes, in the next 4 - 5 years
- ☐ No, we have no plans to implement or upgrade

Please explain

## 12. How would you best describe your HR Service Delivery model?

- ☐ Centralized or Single HR Function
- ☐ Decentralized or Separate HR Function by business unit with corporate oversight
- ☐ Decentralized or Separate HR Function by geography with corporate oversight
- ☐ Shared Services environment with HR Centers of Expertise and HR business partners
- ☐ Hybrid

If Hybrid, please explain

## 13. Based on your model, please choose how each of these activities are being serviced.

	Included in Shared Services?	Center of Expertise?	How is the process sourced?
Workforce Planning (Developing and executing people strategies for the future)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Organizational Development (Organization wide initiatives (e.g., culture, M&A, restructuring)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Recruitment and Selection (Filling today's open positions; includes relocation efforts)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Onboarding	<input type="text"/>	<input type="text"/>	<input type="text"/>
Performance Management	<input type="text"/>	<input type="text"/>	<input type="text"/>
Learning & Development	<input type="text"/>	<input type="text"/>	<input type="text"/>
Succession Planning & Leadership Development	<input type="text"/>	<input type="text"/>	<input type="text"/>
Employee & Labor Relations (Answering Policy Questions, Negotiating Contracts and Handling Employee Issues/Complaints)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Exit Management (Managing Voluntary and Involuntary Separations	<input type="text"/>	<input type="text"/>	<input type="text"/>
Health and Welfare (Strategy & Administration of all H&W programs)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Retirement (Strategy & Administration of all Benefit Programs excluding H&W)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Compensation (Strategy & Administration of all Compensation Plans)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Information Management (Strategy & Administration of HRIS)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Payroll and Time Collection (Strategy & Administration of Payroll and Time and Attendance)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Compliance & Risk Management (Administration of All Federal, State, and local reporting)	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other (Software used by HR Staff members outside of these processes)	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Processes

**14. Over the course of a typical year, how does your HR function CURRENTLY allocate resources (number of staff, percent of time and costs (e.g., technology fees, outsourcing fees, and general administrative fees )? Please insert percentages (use whole numbers) next to each process. Your total needs to equal 100%.**

HR Strategy

HR Talent Management

HR Transactions and Administration

**15. Over the course of a typical year, how does your HR function DESIRE to allocate resources (number of staff, percent of time and costs (e.g., technology fees, outsourcing fees, and general administrative fees )? Please insert percentages (use whole numbers) next to each process. Your total needs to equal 100%.**

HR Strategy

HR Talent Management

HR Transactions and Administration

**16. Rate the importance of the following competencies in each of your HR team members.**

	Very Important	Important	Somewhat Important	Not Necessary
Change Agent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Culture Shaper	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Leadership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Relationship Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self-Awareness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Project Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business Literacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Thinker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HR Functional Knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Acumen	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there additional HR competencies important to your organization?

**17. Please select the competencies that you feel your HR team members need to gain or improve the most.**

- ☐ Change Agent
- ☐ Culture Shaper
- ☐ Leadership
- ☐ Relationship Management
- ☐ Self-Awareness
- ☐ Project Management
- ☐ Business Literacy
- ☐ Strategic Thinker
- ☐ HR Functional Knowledge
- ☐ Technology
- ☐ Financial Acumen

Are there additional HR competencies needing improvement?

**18. What are the critical few metrics that you use to measure the effectiveness and/or efficiency of your HR organization?**

**19. Please comment on any planned future service delivery changes and the impetus for change (e.g., desire for greater efficiency, improve operations, capture synergies across processes and investments, improve quality, globalization initiative, change of business strategy, business reorganization)**