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KPIs for HR Dashboard



Employment brand strength % Job offer acceptance rate # Applicant ratio % Staffing rate % New hire failure % Employee turnover # Employee tenure # Average time to promotion % Accession rate % Succession plans for key positions # Management-to-staff ratio # Certifications per employee $ Human Capital Return on Investment (ROI) $ Human capital value added $ Overtime expense per full time equivalent (FTE) # Headcount # Compensation satisfaction index $ Bonus payout $ Average hourly compensation rate # Entry level wage to local minimum wage % Unscheduled absence rate # Lost time injury frequency rate (LTIFR) # Employee engagement index # Employee satisfaction # Employee advocacy for products and services # Employee advocacy for the organization as an employer % Performance appraisals completed on time % Training penetration rate $ Training investment per full time equivalent (FTE) % Training return on investment # Employment brand strength % Job offer acceptance rate # Applicant ratio % Staffing rate % New hire failure % Employee turnover # Employee tenure # Average time to promotion % Accession rate % Succession plans for key positions # Management-to-staff ratio # Certifications per employee $ Human Capital Return on Investment (ROI) $ Human capital value added $ Overtime expense per full time equivalent (FTE) # Headcount # Compensation satisfaction index $ Bonus payout $ Average hourly compensation rate # Entry level wage to local minimum wage % Unscheduled absence rate # Lost time injury frequency rate (LTIFR) # Employee

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Executive Summary

Key Performance Indicators (KPIs) are today some of the most popular management tools. From the National Museum of Australia, to the First Bank of Nigeria, from the Panama Canal Authority to Rolls Royce, from the Ministry of Education in Brunei Darussalam to the American Medical Association, KPIs are used to understand, learn and improve performance across industries, departments and teams.

The use of KPIs in organizations and departments is enabled by other performance management tools, the most common and important being the Performance Scorecards and the Performance Dashboards.

The Dashboard represents a catalogue of the most relevant KPIs used to measure the performance of an activity, process, department, organization or other entity. An organizational Dashboard includes the KPIs that are specific for the industry the organization operates in, while a departmental Dashboard includes KPIs that reflect that department's contribution to the overall performance of the organization.



The core element of the Performance Dashboard is represented by the KPIs populating it. Without an accurate and standard understanding of the KPIs populating the Dashboard, its proper use can be endangered and its value-add limited.

The KPIs for HR Dashboard report is a comprehensive collection of 30 KPIs considered by the smartKPIs.com team as the most relevant and adequate to populate the Human Resources Department Performance Dashboard. Each KPI is documented based on the best practice KPI documentation template proprietory to smartKPIs.com and available in the smartKPIs Premium section of the website. There are over 30 fields of metadata specific to each KPI, from KPI name to definition, subordinate measures, calculation formula, among others.

Some of the main sections of the report are:

- "KPIs … naturally", an article that sets the context through a discussion on what is old and what is new in the use of KPIs.
- An introduction to the custom KPI documentation form developed by the smartKPIs.com research team for documenting KPIs. It contains over 30 fields of data, making this the most thorough KPI documentation template in use today.
- Comprehensive insights on Key Performance Indicators (KPIs) as performance measurement tools and a glossary explaining the most popular terms characterizing KPIs.
- A list of the KPIs selected for the HR Dashboard, grouped by the main HR processes and functions;
- A detailed description of each KPI listed in the KPIs for HR Dashboard report, as documented in smartKPIs Premium (the premium content section of smartKPIs.com).

This collection of 30 thoroughly documented KPIs are used to measure performance of the Human Resources Department in its most important areas, such as Recruitment, Retention, Compensation, Talent Development, Working Environment and Workforce Profile.

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About Key Performance Indicators (KPIs)

In many domains of human activity, the use of tools is essential for the achievement of results. Measurement and evaluation make no exception, being equipped with both conceptual and physical tools. Of the first category, at the core of any performance measurement and managment system are the measures, metrics, indicators or KPIs used.

Both academic and practitioner literature uses interchangeably these terms, oftentimes even within the same organisation.

At smartKPIs.com, we have adopted the following definitions for these terms:

Measure - A number or a quantity that records a directly observable value. All measures are composed of a number and a unit of measure. The number provides magnitude (how much) for the measure, while the unit gives number a meaning (what). Examples of unit measures are: dollars, hours, meters, inches, etc.

Indicator - Indicators are defined in many ways, but the common meaning for all of them is that they refer to specific information. Thus, the Organisation for Economic Co-operation and Development (OECD) defines an indicator as "*a qualitative or quantitative factor or variable that provides a simple and reliable means to measure achievement, to reflect changes connected to an intervention, or to help assess the performance of a development actor*".[1]

Metric, Performance Measure or Performance Indicator - A generic term encompassing the quantitative basis by which objectives are established and performance is assessed. It helps quantify the achievement of a result, the quantifiable component of an organization's performance. In the context of measuring and managing performance these terms are use interchangeably.

Key Performance Indicator (KPI) - A selected indicator considered key for monitoring the performance of a strategic objective, outcome, or key result area important to the success of an activity and growth of the organization overall. KPIs make objectives quantifiable, providing visibility into the performance of individuals, teams, departments and organizations and enabling decision makers to take action in achieving the desired outcomes. Typically, KPIs are monitored and communicated through dashboards, scorecards and other forms of performance reports.

While on paper the terms listed above can be differentiated, in practice, the difference between them is blurred and, at some extent, irrelevant. As long as their purpose and use is clear and understood by members of the organization, whether they are called performance measures or KPIs is a matter of preference.

At smartKPIs.com, we assess each example entered in the online database and label it as measure, performance indicator or KPI. It is an empirical and subjective approach to catalogue each entry based on relevance. Ultimately, all entries in the online database are considered KPI examples. In addition, to single out the entries that stand out in terms of relevance, we introduced a new label:



smartKPI - A Key Performance Indicator example available on smartKPIs.com, that is recommended as being the most relevant and truly "Key" for organizational performance. They are selected by the editorial team of the website based on criteria such as:

- Listing in academic and practitioner publications that analyse their usefulness;
- Frequency of use by Functional Area / Industry;
- Fulfillment of the criteria of how good KPIs should be defined and used.

1. Organisation for Economic Co-operation and Development, 2002, Glossary of Key Terms in Evaluation and Results Based Management, OECD Publications, Paris, France

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KPIs … Naturally



Measurement as a human activity is not new. It emerged in early history as a mean for discovery and sense making. Archaeologists consider the first measurement tool used in human history to be the Lebombo bone, a baboon fibula containing 29 cut notches. Dated 35,000 BC, this tally stick was discovered in the Lebombo mountains in Swaziland.

Evaluation, as a form of measurement was used as early as the 3rd century AD, when emperors of the Wei Dynasty rated the performance of the official family members. The biased nature of individual performance evaluation was noticed by Chinese philosopher Sin Yu, who reportedly criticized a rater employed by the Wei Dynasty with the following words: "The Imperial Rater of Nine Grade seldom rates men according to their merits, but always according to his likes and dislikes".

A major milestone in making the connection between measuring as a human activity and performance was in 1494, when Luca Pacioli published in Venice *'Summa de arithmetica, geometrica, proportioni et proportionalita'* (*'Everything on arithmetic, geometry, proportions and proportionality'*). It detailed a practice the Venetian sailors had in place to evaluate the performance of their sailing expeditions, which became the basis of the double-entry accounting system.

In time, the subjective nature of individual performance evaluations and the dominance of financial indicators for evaluating enterprise performance became stepstones for performance management in human activities.

The industrial revolution added to this combination the "*organization as a machine*" metaphor that played a major role in driving improvements in efficiencies and effectiveness. The result was an organizational performance management model based on mechanistic, command-and-control thinking, driven by subjective individual performance assessments and financial indicators and crowned by pay-for-performance arrangements.

Did it work? To a certain extent, yes. Many organisations flourished and matured based on this model.

Does it have flaws? Many. And while historical circumstances attenuated them in time, today's environment amplifies and exposes them at an accelerated rate.

Is there a better way? Yes, but it is not simple. It requires a change at multiple levels, from the underlying philosophy of performance, to mentalities and processes. This is not easy.

Over time, the use of Key Performance Indicators (KPIs) became synonym to performance measurement and management. KPIs are the link between the old and the new in performance management. Their use, however, is much richer and rewarding in an environment based on organic performance architecture principles:

Organizations are echo-systems in their own right. They vary in terms of maturity and the environment in which they operate. As such, their use of performance management systems should reflect their own "personality". You can try to build an igloo in Sahara, but it won't be sustainable. The performance architecture of each organisation needs to be unique and to reflect its internal and external environment.

Systems thinking provides a much richer context for understanding and improving performance. Command-and-control worked in time for the army, for increasing productivity of unskilled workers during the industrial revolution and for managing large organizations (such as the public service). Today, knowledge workers form the majority of the workforce in developed economies, operate in a much more interconnected environment and have to make decisions at an accelerated pace. Understanding the systems in which we operate, analysing flow and learning based on data become ever more important today and complement the traditional simplistic managerial approach of executing orders from above.

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KPIs should be used primarily for learning. The role of KPIs should be the one of providing the required information to assist in navigating towards the desired results. The same principle is used by ants, who leave pheromone trails to assist each other in navigating towards the food source. Similarly, the nerve impulses travel through the different points of the nervous system, transmitting information. KPIs results should travel through the organisation, facilitating communication, providing a base for analysis / synthesis and ultimately decision making across all levels of the organisation.

Data accuracy in human administration is an elusive desideratum. Neils Bohr once said: *"Accuracy and clarity of statement are mutually exclusive"*. Accuracy is a challenge in exact sciences and even more in human administration. Striving to obtain any KPI data is a challenge in itself for many organisations and data accuracy is an even bigger ask. The use of KPIs should acknowledge this aspect and be oriented towards making the most out of existent data, oftentimes by using variance intervals. This approach is used by the human body. If the temperature drops under a safe limit, we shiver. If the temperature increases, we sweat. Both are performance improvement initiatives of the body, aimed to regulate its temperature back to safe limits. The KPI here is the temperature. While it is not a constant, its trend is good when within certain safe limits.

The use of KPIs for rewards and punishment should be limited and driven by self-assessment. Purposeful oriented behaviour is a characteristic of living organisms. For humans and many other species, this behaviour is amplified by rewards and punishment. Along with this amplification, risks are amplified, too. Gaming of results, lack of cooperation, decreased morale and work accidents are some of the undesired consequences. On the other hand, the majority of nerve impulses in the human body transmit general information. Only in particular situations pleasure or pain signals. Similarly, the use of KPIs for rewards and punishment should be the exception to the rule, rather than the norm.

Embedding KPIs in organisations through visualization and communication of KPIs results is the key to maximising their value added. Variations in the KPIs used by the human body are felt by our senses as their impact is sensory rich. Similarly, KPIs used in an organizational context should be embedded in everyday use and be a part of the working experience. The most important aspect of communicating KPI results is their visual representation. This is key, both in terms of optimising the layout of the data representation and the presence of visual displays in the working environment. The range of media is diverse today: posters, whiteboards, banners, LED and LCD monitors should be combined to bring results to life across the organization. KPI results should not be restricted to paper reports and computer screens anymore.

New philosophy of performance, driven by self-assessment and purposeful achievement as a mean to happiness. While happiness means many things to many, a common expression of this feeling is the result of the purposeful achievement of a desiderate. Achieving something we want, while shared with others, is about us and reverberates strongly in our inner self. Transposing this powerful catalyst of performance in both our personal and organizational life is facilitated by a new paradigm: Happiness is driven by achievement. Achievement is an expression of performance. If we want to be in control of our happiness, we should be in control of our performance.

Self-assessment of performance results is not easy. However, if more emphasis is placed on building this capability in each employee, organisations can benefit by creating a rewarding environment conducive to happiness. In this environment, managers can focus on understanding and improving the working system, while employees can focus on self-assessment of the results' achievement, learning and communicating. Purposeful achievement of results in a well-structured working system would bring both individuals and organisation much closer to happiness and fulfilment compared to the payment of bonuses in the current command-and-control driven dominant paradigm.

KPIs are here to stay. The question we have to answer is how do we want to use them: mechanistically or naturally?

Aurel Brudan,
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KPI Documentation Form Template as Used by smartKPIs.com

Organizational capability or department that fulfils a specific business function.

Sub-grouping of the functional area or industry.

Aggregate of organizations operating in a particular field, often named after its principal product or service.

Functional Areas
N/A

Sub-categories
Hospitals

Industries
Healthcare

KPI record
sK41

Indicator type
smartKPI

Unit type
%

Key Performance Indicator (KPI) example unique identification number assigned automatically when entered in the database.

Classification of performance indicators based on their relevance and level of analysis.

Type of measurement unit to reflect results (number, percentage, monetary value).

Name of the indicator, a brief representation of its role.

Succinct description of the indicator, clarifying in business terms its name.

Other versions of the indicator name, as used in practice.

Name

% Hospital bed occupancy rate

Definition and variations

Definition
Measures the percentage of beds in the hospital that are occupied by patients, from overall number of hospital beds.

Variations
% Bed occupancy rate - long-term patients
% Bed occupancy rate - short-term patients

Related KPIs
Hospital bed capacity
$ Hospital operating profit per bed
# Hospital admission rate per 10,000 inhabitants

Tags
hospital, occupancy

List of other related indicators in the database, either upstream (influenced by this indicator), or downstream (with influence on this indicator).

Keywords relevant to the indicator, useful for navigating by thematic clusters of similar examples.

Names of the measures used in calculating the indicator (if applicable).

Calculation

Subordinate measures used for calculation
A = # Hospital inpatient beds occupied
B = # Hospital inpatient beds

Calculation formula
(A/B)*100

Formula type
Rate

Trend is good when
Increasing

Expresses the indicator as a formula linking the subordinate measures (if applicable).

Type of calculation formula, based on the combination of subordinate measures (rate, ratio, index, composition).

Direction in which the results of the indicator need to move for a positive result.

Explanation of the reason or business justification for using the indicator.

Classification of performance indicators based on what dimension of an activity or result they are measuring.

Strength of the indicator based on the stage of evaluation: input, process, output or outcome.

Focus

Purpose
To indicate the hospital's efficiency regarding bed management and its spare capacity.

BSC perspective
Customer

Measurement focus
Volume

Impact stage
Process

Indicator focus
Leading

Measurment type
Quantitative

Level
Strategic

Standard Balanced Scorecard perspective where the indicator fits best.

Type of indicator based on the emphasis of past activity or future performance.

Measurement approach for the KPI (Quantitative or qualitative).

Organizational level at which the indicator is measured (strategic or operational).

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Period for which the results of the indicator have been measured.

Frequency of data gathering and reporting for the indicator.

Subjective evaluation of the integrity characteristics of the data being reported.

Data profile

Data capture period
Spot

Standard reporting frequency
Daily

Data integrity
High

Automation fit
Recommended

Limitations
Accurate reporting for this KPI requires real-time registration of inpatients, so that no lag exists between the actual hospitalization (and the occupancy of the bed) and registering it in the bed management system.

Suitability for automated data gathering by importing data in the centralized reporting tool.

Other limitations (data or reporting system related) to be considered during the use of the indicator.

Subjective evaluation of the suitability for benchmarking based on indicator reporting standardization in the industry.

Additional information related to the target setting for this indicator.

Thresholds outlining the limits for positive and negative results, as well as the tolerance interval.

Targets

Benchmarking fit
Suitable

Notes
Given the universality of the measure, it suits benchmarking very well. High levels of bed occupancy reflect the ability of a hospital to provide safe patient care and indicate an efficient use of a hospital's capacity.

Threshold exemple
Red: <70%

Yellow: 70-90%

Green: >90%

Analysis and resources

Overall notes
Bed occupancy rate is used to assess the demands for hospital beds and hence to gauge an appropriate balance between demand for health care and number of beds available. Managing the bed occupancy rate can be a difficult task due to the demand that cannot be controlled by postponing (like in the case of a guest house, for example).

Additional resources
http://news.bbc.co.uk/2/hi/health/5370336.stm

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2. Health Policy Research Associates & Institute for Health Policy (2007), "Performance Reviews of Provincial and Line Ministry Healthcare Services", available at: http://203.94.76.60/AHF/pdf/CD03/Assesment_Overall_Perfor_bw_Districts02_35-54.pdf
3. Republic of the Philippines, Department of Health (2004),
OTHER HEALTH FACILITIES STATISTICAL REPORT, available at: www.doh.gov.ph/bhfs/images/issuances/psychiatric/statisticalreport.pdf

General remarks about the use of the indicator.

Other recommended online and offline resources for understanding and using the indicator.

List of resources reviewed as part of the documentation process.

Average rating of the indicator by smartKPIs.com community members.

Total number of pageviews for the indicator.

Date stamp of when the indicator page was last updated.

Statistics & bookmarking

Rating
(1 / 5)

Add rating

Views
1780

Share

Last updated
03 February 2011

Save

Rating button.

Share button, for social media communication.

Option to save the indicator in a preferred list available online at smartKPIs.com.

smartKPIs Community

Other popular KPI examples
- # Average length of stay in ER
- % Emergency Department visits resulting in hospital admissions
- % Employee turnover

Comments

Other indicators saved in the preferred list along with the current example by smartKPIs.com community members.

Option to comment, provide feedback and engage with other members of the smartKPIs.com community on topics relating the documentation and use of the indicator.

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About the Human Resources Functional Area

The Human Resources function has the overall responsibility to implement strategies and policies regarding the management of employees within the organization. Its prime role is to support the achievement of organisational goals by ensuring that relevant and innovative people policies, practices and systems are in place so that the organisation can attract, retain and develop outstanding staff.

Sub-categories in smartKPIs.com

Compensation and Benefits
Service Delivery
Efficiency and Effectiveness
Talent Development
Recruitment
Workforce
Retention
Working Environment

History

Human Resources was shaped as a discipline by two main movements. The first one is the recognition among organizations of the importance that needs to be given to the welfare of the workforce. For example, Welfare Officers were introduced during the World War I in the UK factories. The second one, generated in the U.S. in the early 1900s, developed as a consequence of the increasing demand for efficient working practices within the highly mechanized factories.

Human Resources term reflects a relatively modern management concept, used for the first time in the 1960s. Its origins are shaped by the introduction of “welfare management” practices and the “scientific management” principles in organizations. The applicability of these terms enabled the outline of the administrative management activity, coordinating a range of worker related processes and generating, in time, the well known “personnel function”.

Mostly developed in the multinational and international corporations’ context, Human Resources became a frequently used term, defining a stronger strategic approach to workforce management. Since then, Human Resources gained a more significant influence within strategic management roles, while being shaped into sophisticated influential departments with board-level representation.

Relevant HR Professional Associations

Australian Human Resources Institute (AHRI)
Chartered Institute of Personnel and Development (CIPD)
Human Capital Institute (HCI)
International Personnel Management Association of Canada (IPMA – Canada)
International Public Management Association for HR (IPMA-HR)
National Association of Personnel Services (NAPS)
National Human Resources Association
Society for Human Resource Management (SHRM)

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List of KPIs for HR Dashboard

HR Dashboard Function	Key Performance Indicators (KPIs)
Recruitment 4 KPIs	# Employment brand strength
	% Job offer acceptance rate
	# Applicant ratio
	% Staffing rate
Retention 4 KPIs	% New hire failure
	% Employee turnover
	# Employee tenure
	# Average time to promotion
Workforce profile 4 KPIs	% Accession rate
	% Succession plans for key positions
	# Management-to-staff ratio
	# Certifications per employee
Efficiency and Effectiveness 4 KPIs	$ Human Capital Return on Investment (ROI)
	$ Human capital value added
	$ Overtime expense per full time equivalent (FTE)
	# Headcount
Compensation 4 KPIs	# Compensation satisfaction index
	$ Bonus payout
	$ Average hourly compensation rate
	# Entry level wage to local minimum wage
Working Environment 6KPIs	% Unscheduled absence rate
	# Lost time injury frequency rate (LTIFR)
	# Employee engagement index
	# Employee satisfaction
	# Employee advocacy for products and services
	# Employee advocacy for the organization as an employer
Talent Development 4 KPIs	% Performance appraisals completed on time
	% Training penetration rate
	$ Training investment per full time equivalent (FTE)
	% Training return on investment

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Functional Areas	Sub-categories	Industries
Human Resources	Recruitment	Any
KPI record	**Indicator type**	**Unit type**
sK2	smartKPI	#

Name

Employment brand strength

Definition and variations

Definition

Measures how desirable an organization is as a place to work among employees and job seekers, according to an index based on survey questions and/or quantitative metrics.

Variations

Employment brand strength by age group
Employment brand strength by tenure
Employment brand strength by employee ranking
Employment brand strength by employment type
Employment brand strength by demographics characteristics

Related KPIs

Average time to fill a vacant position

Tags

employment, brand, attractiveness

Calculation

Subordinate measures used for calculation

Index of various measures such as:
- Internal perception of the employment offer
- Closeness of the employment perception to reality
- External perception of the employment offer
- Media coverage or other external coverage of the organization and its employees

Calculation formula	Formula type	Trend is good when
Index of survey results - standardized.	Index	Increasing

Focus

Purpose

To assess the attractiveness of the organization's employment value preposition.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

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Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Annually	Low

Automation fit

Not recommended

Limitations

The data for this measure is gathered by collating responses to one or more questions from employees and job applicants surveys. In addition, externally produced documents - such as media stories - may be used in calculating the index. Thus, measurement approach varies across organizations and data accuracy is limited.

Targets

Benchmarking fit

Unsuitable

Notes

Targets will depend on the scale used for the responses to the questions in the survey. This indicator can be very important for organizations with low levels of employee engagement, a high turnover or low acceptance ratio of employment offers. A strong employment brand can help organizations attract and retain talent.

Threshold exemple

Red: <50	Yellow: 50-70	Green: >70

Analysis and resources

Overall notes

Data collection depends on the effectiveness of the indexing methods and survey design and delivery. All survey measures represent employee perceptions at a point in time and can reflect temporal events.

Additional resources

http://www.workforce-strategy.com/EmploymentBrandPresentation.pdf

http://www.emeraldinsight.com/Insight/viewContentItem.do;jsessionid=56D8B90FC62CC9E0C74FCF020B7FED4D?contentType=Article&hdAction=lnkhtml&contentId=1747897

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Brand Study. A two-phase research initiative among HR professionals from 25 countries", available at: www.kommunikationsforum.dk/file.asp?id=3869
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http://jonhunt.org/resources/WhenGoodMetricsGoBad.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Recruitment	Any
KPI record	**Indicator type**	**Unit type**
sK53	smartKPI	%

Name

% Job offer acceptance rate

Definition and variations

Definition

Measures the percentage of job offers accepted by the applicants out of the total number of employment offers made.

Variations

% Acceptance rate
% Offer acceptance rate
% Employment offer acceptance rate

Related KPIs

Long term vacancies per total number of jobs

Tags

job offer

Calculation

Subordinate measures used for calculation

A = # Job offers accepted
B = # Job offers made

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Increasing

Focus

Purpose

To assess the attractiveness of job offers and of the organization overall, as attractive job offers from "desired" organizations are more likely to be accepted. Also reflects the quality of the recruitment process, as good candidate screening should ensure high job acceptance rates.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Output
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Quarter	Quarterly	Medium

Automation fit

Recommended

Limitations

Difficult to obtain accurate figures if the HR systems are not accurately synchronized to capture the data for this KPI across the organization. It requires a certain level of centralization of job offers processing.

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Targets

Benchmarking fit

Suitable

Notes

The target should be set close to 100% as lower rates result in loss of productivity and inefficiencies. Due to the generic measurement approach for this KPI, benchmarking is suitable.

Threshold exemple

Red: <80%
Yellow: 80-90%
Green: >90%

Analysis and resources

Overall notes

A high level of the KPI partially reflects the quality of candidate screening and interviewing and good job market competitiveness, as offers were made to candidates that accepted them. A low level of job offer acceptance rate indicates that the motivation of the candidates was not well evaluated by the interviewer or that the offer / company is not competitive enough on the job market in terms of salaries and working environment.

Additional resources

http://www.ere.net/2007/07/02/increasing-offer-acceptance-rates-when-your-company-pays-crummy-wages-part-2-of-2/

http://www.hbs.edu/about/statistics/mba.html

http://www.deloitte.com/assets/Dcom-UnitedStates/Local%20Assets/Documents/us_Talent_People%20Power_BOE%20Talent%20story%281%29.pdfÂ

http://www.law.umaryland.edu/academics/journals/jbtl/issues/3_1/3_1_097_Stabile.pdf

http://www.marshall.usc.edu/assets/036/8654.pdf

http://www.pwc.com/en_US/us/hr-saratoga/assets/review-december-2009.pdf

http://breakpointhr.blogspot.com/2009/06/offer-acceptance-rate-and-show-up-rate.html

http://marino72.files.wordpress.com/2009/06/the-hr-function-of-the-future.pdf

References

1. Australian Government, Department of Families, Housing, Community Services and Indigenous Affairs (2009), "People Strategy 2009-2011", available at: http://www.fahcsia.gov.au/about/publicationsarticles/corp/people_strategy/Documents/FaHCSIA_PeopleStrategy2009-11.rtf
2. Becker, W., J., Connolly, T., Slaughter & J. E. (2010), "The effect of job offer timming on offer acceptance, performance and turnover", Personnel Psychology, 1 April 2010, available at: http://www.allbusiness.com/labor-employment/human-resources-personnel-management/14359383-1.html
3. Wadhwa, V (2006, "Industry Trends in Engineering Offshoring", available at: http://www.nae.edu/File.aspx?id=10286

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Functional Areas	Sub-categories	Industries
Human Resources	Recruitment	Any
KPI record	**Indicator type**	**Unit type**
sK1805	smartKPI	#

Name

Applicant ratio

Definition and variations

Definition

Measures the average number of applicants per each open position advertised.

Variations

Applicants per open position
Suitable (qualified) applicants per open position
Responses (CVs received) per open position
Applications received per open position
Average number of applications received per vacancy

Related KPIs

% Applicant interview rate

Tags

quantity, employer of choice

Calculation

Subordinate measures used for calculation

A = # Applicants for open positions
B = # Open positions advertised

Calculation formula	Formula type	Trend is good when
A/B	Average	Increasing

Focus

Purpose

To indicate the organization's attractiveness in the job market and the efficiency of the recruitment campaign.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Medium

Automation fit

Not recommended

Limitations

Data gathering efficiency and accuracy should be optimized by using monitoring electronically all open requisitions and responses. Centralization of recruitment tracking facilitates report automation.

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Targets

Benchmarking fit

Suitable

Notes

Results for this KPI are affected by both internal factors such as the job positions' attractiveness as well as external factors such as the industry and labor market trends. Targets should be set in accordance with both type of factors.

Threshold exemple

Red: <2 Yellow: 2-3 Green: >3

Analysis and resources

Overall notes

Though an increasing trend for this indicator is desired, an excessively high ratio might be hard to manage by the recruitment team. Competition in the labor market increases the chance to get more suitable applicants, but it also increases the workload of recruiters. Therefore, the HR department must aim for a balanced ratio of applicants per recruiter in order to ensure quality outcomes.

Oftentimes a variation of this KPI is used: # Qualified applicant ratio, tracking only candidates that fit a minimum qualification standard for the role.

Additional resources

http://www.workplace.gov.au/NR/rdonlyres/BDD949BD-8C1D-4E85-AAD8-8FE3827FD075/0/2211111213AUSAccountants.rt

http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_236889.pdf

http://www.azgita.gov/planning/2010StrategicPlanAppendix.pdf

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1. Australian Government, Department of Education, Employment and Workplace Relations (DEEWR) Victorian State Office (2009), "ICT Professionals Report", available at: http://www.skillsinfo.gov.au/NR/rdonlyres/65619A92-52DB-4053-89AD-1F2DA9B188ED/0/ICTReportVIC.doc
2. Skills Australia, "Software and applications programmers", available at: http://www.skillsaustralia.gov.au/PDFs_RTFs/SOL/2613SoftwareandApplicationsProgrammers.pdf
3. The University of Texas Medial Branch (UTMB) (2010), "Institutional Scorecard", available at: https://www.son.utmb.edu/about/documents/Scorecard%20(2).pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Recruitment	Any
KPI record	**Indicator type**	**Unit type**
sK763	smartKPI	%

Name

% Staffing rate

Definition and variations

Definition

Measures the percentage of job positions filled, from overall approved and financed job positions in the organizational chart of the organization.

Variations

% Fill rate
% Job positions filled

Related KPIs

% Work performed by staff over-skilled for the job complexity

Tags

recruitment

Calculation

Subordinate measures used for calculation

A = # Filled job positions
B = # Approved and financed job positions in the organizational chart of the organization.

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Increasing

Focus

Purpose

To indicate the human capital readiness in terms to headcount, in accordance to the approved organizational chart. Unoccupied positions may hinder productivity.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Output
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Medium
Automation fit	**Limitations**	
Recommended	Accurate reporting for this KPI is dependent on a well maintained tracking system of job openings and their status.	

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Targets

Benchmarking fit	Notes
Suitable	This KPI is an important driver of productivity, as in some labor intensive functions such as customer service or call center, a suitable staffing rate is essential for operating. Targets vary according to the industry, the HR recruitment capabilities and the structural change that increase the number of approved new job positions.

Threshold exemple

Red: <50% | Yellow: 50-70% | Green: >70%

Analysis and resources

Overall notes

One of the main responsibilities of the HR functions is to provide staffing and recruitment support, thus job fill rate may be relevant for indicating recruitment productivity and efficiency. However, using this indicator should be balanced by considering also qualitative measures, such as rookie ratio.

Additional resources

Larson, L., A., Lakin, K., C., Bruininks, R., H. & Braddock, D., L. (1998), "Staff recruitment and retention: study results and intervention strategies", American Associaton on Mental Retardation, Washington, DC

References

1. Indiana State Police (2001), "Public Safety Matters Evaluation Committee", available at: http://www.in.gov/legislative/pdf/STPOLEVAL.PDF
2. Silverman, J. (2005), "2005 Match Day: ob.gyn. makes slight recovery; Fill rate was 94.7% following 2-year decline", available at: http://findarticles.com/p/articles/mi_m0CYD/is_8_40/ai_n13675009/
3. University of Michigan, "HR Metrics Reports", available at: http://www.mais.umich.edu/mais_connection_conference/download/presentation_files/applying_hr_metrics/HRMetricsReports.xls

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK52	smartKPI	%

Name

% New hire failure

Definition and variations

Definition

Measures the rate at which new employees left the organization (voluntary or by being terminated) in a short time period after being hired (e.g. under 30, 90 or 180 days).

Variations

% Turnover of the new hire within the first year
% New hire turnover by department
% New employees failure factor

Related KPIs

% Accession rate

Tags

turnover, retention, new hire

Calculation

Subordinate measures used for calculation

A = # Newly hired employees that left the organization (voluntary or terminated) after a short tenure (i.e. less than 1, 3 or 6 months)
B = # New hires

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Decreasing

Focus

Purpose

To assess the level of recruiting process effectiveness. It reflects new hire quality and fit with the role and organization.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Rolling average	Quarterly	Low

Automation fit

Recommended

Limitations

Difficult to obtain accurate figures if the HR systems are not accurately synchronized to capture the data for this KPI.

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Targets

Benchmarking fit

Suitable

Notes

A target level as low as possible is desirable for this indicator, as failed recruitment exercises have multiple effects in for both the HR department, the internal client and the employment brand name.

Threshold exemple

Red: >12%
Yellow: 10-12%
Green: <10%

Analysis and resources

Overall notes

New hire failure has negative effects due to the loss of know-how, the cost of replacing employees and the duration of the replacement process. A high failure rate for new employees requires root-cause analysis to determine and address its causes.

Additional resources

http://www.staffing.org/

http://www.furstperson.com/blog/?p=273

http://hr.wtgalumni.com/media/flash_paper_presentations/nickworrall.swf

http://www.jobsection.info/pdf/Ameriprise%20HR%20Professionals%20Presentation.pdf

http://www.2sbdigest.com/New-Hire-Retention

http://www.scribd.com/doc/6642539/HR-Balncd-Scorcard-c

References

1. Insala (2010), "Mentoring for Onboarding: Increase New Hire Retention and Maximize Hiring Investment", available at: http://www.insala.com/Articles/Mentoring/mentoring-for-onboarding-increase-new-hire-retention-and-maximize-hiring-investment.asp
2. Ohio Department of Administrative Services, Human Resources Division, Office of Organizational Development (2009), "State of Ohio Workforce Planning Guide", available at: 2009http://wfp.das.ohio.gov
3. Talent Plus (2007), "New-Hire Retention and Turnover", available at: http://www.talentplus.com/userfiles/file/13_New_Hire_Retention_and_Turnover_-_Financial_1674.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK1	smartKPI	%

Name

% Employee turnover

Definition and variations

Definition

Measures the rate at which employees leave the organization in a given time period (i.e. month, quarter, year).

Variations

% Employees that leave the organization in a given time period
% Employees that left the organization in the last 3 months
% Employee attrition
% Employee loyalty
% Employees fluctuation rate

Related KPIs

Net hire ratio

Tags

employees, loyalty, retention, turnover

Calculation

Subordinate measures used for calculation

A = # Employees that left the organization by the end of the reporting period
B = # Employees of the organization at the beginning of the reporting period

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Decreasing

Focus

Purpose

To indicate the level of employee satisfaction with the organization, as an unhappy employee is more likely to leave the organization.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Quarter	Quarterly	Medium

Automation fit

Recommended

Limitations

Difficult to obtain accurate figures if the HR systems are not enabled to timely capture the data for this KPI.

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Targets

Benchmarking fit

Suitable

Notes

Targets may vary based on the industry profile and the workforce trends on the market. A high turnover rate has a negative impact on business, due to the loss of knowledge, the cost of replacing employees and the duration of the replacement process. The positive impact of employee fluctuation is the influx of new ideas, capabilities and energy of the new employees.

Threshold exemple

Red: >30%

Yellow: 20-30%

Green: <20%

Analysis and resources

Overall notes

This measure may be influenced by the HR department performance, the working environment and work policies, the supervisor and team, as well as the promotion and professional development opportunities for the future. An exit interview is a frequently used procedure that is applied by HR specialists in order to assess and avoid the causes that determine a high employee turnover rate.

Additional resources

http://www.cipd.co.uk/subjects/hrpract/turnover/empturnretent.htm

http://www.acas.org.uk/index.aspx?articleid=1183Â

http://ideas.repec.org/p/iae/iaewps/wp2002n19.html

http://www.acas.org.uk/index.aspx?articleid=1183

http://www.chally.com/turnover_cost_calculator.htm

References

1. International Public Management Association for Human Resources (2010), "HR Metrics Benchmarking Committee Report", available at: http://www.ipma-hr.org/sites/default/files/finalbenchreport.pdf
2. Jackson, M., D. (1999), "Employee Retention", available at: http://www.usfa.dhs.gov/pdf/efop/efo29426.pdf
3. Pinkovitz, H.W., Moskal, J. & Green, G. (1997), "How Much Does Your Employee Turnover Cost?", available at: http://www.uwex.edu/ces/cced/economies/turn.cfm

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK8	smartKPI	#

Name

Employee tenure

Definition and variations

Definition

Measures the number of years that the employees have been with their current employer, calculated at organizational level.

Variations

Median time of tenure with current employer
Average employee (workforce) tenure
Length time service of staff who have left
Average employee years of service with company

Related KPIs

Employee satisfaction

Tags

human resources, employee, tenure

Calculation

Subordinate measures used for calculation

A = # Time spent with the company by employee 'i' (in months or years), where i=1 to n
n = # Headcount
Note: can be calculated as an average or as a mean

Calculation formula	Formula type	Trend is good when
(A1+A2...+An)/n	Average	Increasing

Focus

Purpose

To monitor the length of service of employees, as an indicator of workforce profile.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Duration	Output
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Biannually	Medium
Automation fit	**Limitations**	
Recommended	Data reporting and accuracy is dependent on well maintained electronic employee records.	

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Targets

Benchmarking fit

Unsuitable

Notes

According to the Bureau of Labor statistics Washington, the median number of years that wage and salary workers had been with their current employer was 4.4 years in January 2010, 4.1 years in January 2008, and 4.0 years in January 2006.
Information on employee tenure has been obtained from supplemental questions to the Current Population Survey (CPS) every 2 years since 1996. The CPS is a monthly survey of about 60,000 households that provides information on the labor force status, demographics, and other characteristics of the civilian non-institutional population age 16 and over. The questions about employee tenure measure how long workers had been with their current employer at the time of the survey. A number of factors can affect the median tenure of workers, including changes in the age profile among workers as well as changes in the number of hires and separations.

Threshold exemple

Red: <12 Yellow: 24-36 Green: >36

Analysis and resources

Overall notes

It is possible to report individual employee tenure not only as a total number of months or years spent with the company, but also broken out in the time duration spent per job position. ThisÂ granularity helps managers to assess employee eligibility for promotions, position rotation as well as other tenure-related benefits, such as plan achievement, leaves of absence etc.

Monitoring average employee tenure by job may be useful in indicatingÂ unexpectedly low tenure in a particular department. If it is not managed, high turnover can lead to poor employee morale and poor employee performance.

It does not always reflect employee satisfaction with the working environment, as some employees could stay with the company for other reasons, such as not being able too find a better job or just wanting to add the current position to their CV.

While high employee tenure indicates retained knowledge, it may also impact the level of new ideas and energy associated with new employees.

Employee tenure varies across industries, is affected by labour market conditions and by organizational maturity. Benchmarking is not recommended for this reason.

Additional resources

http://www.jstor.org/pss/258331

http://www.ctrpl.org/documents/US%20Dept%20of%20Labor%20Tenure.pdf

http://www.abs.gov.au/ausstats/abs@.nsf/productsbytitle/261D5A655541A61ECA2568A900139361?OpenDocument

References

1. Employee Benefit Research Institute (2005), "Employee Tenure: Stable Overall, but Male and Female Trends Differ", EBRI Notes, Vol. 26, No. 3, pp. 2-10
2. Indiana Business Research Center (2010), "Indiana Employee Tenure by Industry and Manufacturing Sub-Sector", available at: http://www.incontext.indiana.edu/2010/july-aug/July-Aug_10.pdf
3. United States Department of Labor (2008), "Employee tenure in 2008" press release, available at: http://www.ctrpl.org/documents/US%20Dept%20of%20Labor%20Tenure.pdf
4. United States Department of Labor (2010), "Employee tenure summary" press release, available at: http://www.bls.gov/news.release/tenure.nr0.htm
5. University of Tennessee, "Employee Tenure Information Query", available at: http://rwd.tennessee.edu/content/zpr_pa_tenure_employee_tenure_information/ut%20word%20doc_doc/postscript/index.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK244	smartKPI	#

Name

Average time to promotion

Definition and variations

Definition

Measures the time taken to receive an internal promotion within the organization.

Variations

Average lead time to promotion

Related KPIs

% HR mobility rate

Tags

promotion, vacancy

Calculation

Subordinate measures used for calculation

Ai = # Promotion time for position 'i' (months), where i=1 to n
n = # Promotions within the given period

Calculation formula	Formula type	Trend is good when
(A1+A2+...An)/n	Average	Within range

Focus

Purpose

To indicate the company's policy with regards to internal opportunities of reassignments to a position of higher rank.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Duration	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Medium
Automation fit	**Limitations**	
Recommended	Accurate reporting for this KPI is dependent on a well maintained HR management system and up to date records of internal promotions.	

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Targets

Benchmarking fit	Notes
Unsuitable	Targets may vary based on industry, the open requisition requirements and internal capabilities, as well as the company's policies regarding internal promotions.

Threshold exemple

Red: <6; >24 Yellow: 6-12; 18-24 Green: 12-18

Analysis and resources

Overall notes

Some job positions might require more experience in the company than others, for example a management open requisition. Being an average, a limitation of this measure is that it doesn't show the value for each position.

Additional resources

http://www.pwc.com/en_US/us/people-management/assets/flexible-workforce-arrangements.pdf

http://or.journal.informs.org/cgi/content/abstract/33/1/109

http://www.sciencedirect.com/science/article/B6WJ3-4PSK92J-1/1/ef1788ce9902ce6c2c63f692abc047f8

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1. Byham, W.,C. & Bernthal, P.R., "The Case for Internal Promotions", available at: http://www.ddiworld.com/DDIWorld/media/white-papers/thecaseforinternalpromotions_wp_ddi.pdf?ext=.pdf
2. Krull, H. (2005), "Earnings Disparities: The Role of Internal Promotions and Job Performance Evaluations", available at: http://www.fdic.gov/bank/analytical/cfr/2006/jan/CFRSS_2006_Krull.pdf
3. Plattsburgh State University of New York (2009), "Plan for Internal Professional Promotions", available at: http://www.plattsburgh.edu/offices/admin/hr/internalprofessionalplan.php

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Functional Areas	Sub-categories	Industries
Human Resources	Workforce	Any
KPI record	**Indicator type**	**Unit type**
sK762	smartKPI	%

Name

% Accession rate

Definition and variations

Definition

Measures the proportion of new hires from the total number of employees in the organization.

Variations

% New hire rate
% New hires

Related KPIs

% New hire failure

Tags

accession, new hire, recruitment

Calculation

Subordinate measures used for calculation

A= # New employees hired in the last months (i.e. 3 months). It includes any permanent or temporary addition to employment due to expansion, replacem
B= # Employees

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Within range

Focus

Purpose

To track the refreshing of the organization's human capital.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Input
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Monthly	Medium

Automation fit

Recommended

Limitations

It requires accurate data feed from the recruitment process. For automated reporting the HR management system should be linked to the operational performance report for this indicator.

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Targets

Benchmarking fit

Suitable

Notes

Targets should be set in accordance with the Human Capital Development Plan within each organization.

Threshold exemple

Red: <25%

Yellow: 25-50%

Green: >50%

Analysis and resources

Overall notes

This KPI should be used in conjunction with a succession planning KPI, as they are inter-related. Current and future competences planning may inform the use of accession rate to enable organisational human capital readiness.

Additional resources

http://www.usna.edu/IR/htmls/lead/database/cohort7/c07_robbins.pdf

http://emlab.berkeley.edu/~card/papers/sub-training-programs.pdf

References

1. Bureau of Labour and Employement Statistics, "Glossary of terms commonly used in labour and employment", available at: http://www.bles.dole.gov.ph/HTML%20FILES/glossary2.html
2. Andersson, F., Brown, C., Campbell, B., Chiang, F. & Park, Y., "The Effect of HRM Practices and R&D Investment on Worker Productivity", available at: http://web.mit.edu/ipc/sloan05/campbell_slides.pdf
3. Department of Personnel & Administration Colorado, "Succession Planning Strategy", available at: http://www.colorado.gov/cs/Satellite/DPA-DHR/DHR/1248577225227

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Functional Areas	Sub-categories	Industries
Human Resources	Recruitment	Any
KPI record	**Indicator type**	**Unit type**
sK1777	smartKPI	%

Name

% Succession plans for key positions

Definition and variations

Definition

Measures the percentage of key organizational positions that are supported and secured by a succession plan that ensures a smooth transition to the next incumbent from the total number of key positions (roles) within the organization.

Variations

% Key positions with a succession plan

Related KPIs

Recruitment source ratio

Tags

internal promotion, recruitment

Calculation

Subordinate measures used for calculation

A = # Key organizational positions with a succession plan in place
B = # Organizational positions and roles identified as key

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Increasing

Focus

Purpose

To indicate the organization's effectiveness in identifying and developing talented employees for key organizational positions.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Output
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Monthly	Medium

Automation fit

Not recommended

Limitations

In order to monitor this indicator, the process of succession planning needs to be clearly defined and structured by the Human Resources department. Automation is enabled by linking HR management systems to performance reporting tools.

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Targets

Benchmarking fit

Suitable

Notes

Targets differ according to HR strategy and its emphasis on succession planning. A high number of succession plans for key positions indicates a robust leadership development strategy.

Threshold exemple

Red: <50% Yellow: 50-80% Green: >80%

Analysis and resources

Overall notes

Succession plans for key positions are considered to be linked to the profitable growth of the business. This process is mainly implemented in large multinational corporations, constantly reviewing managers for career development in order to create competent and motivated staff.

A pool of emerging talented managers can be formed and continually reviewed for career development, with the specific aim to create knowledgeable, skilled and motivated people. Managers can receive leadership and teamwork training to develop their capability to identify and support talent.

Additional resources

http://www.johnsoncontrols.com/publish/etc/medialib/jci/corporate/sustainability.Par.59484.File.dat/2007%20GRI%20G3%20Report%20Johnson%20Controls.pdf

http://www.oracle.com/media/peoplesoft/en/pdf/datasheets/peoplesoft-succession-planning-data-sheet.pdf

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1. Yale University (2008), "Human Resources Community Meeting notes", available at:
http://www.yale.edu/hronline/documents/2008NOV21HRTownHallPresentation.ppt
2. OGC (2009), "Her Majesty's Treasury Procurement Capability Review Improvement Plan", available at:
http://www.ogc.gov.uk/documents/HMT_Improvement_Plan.pdf
3. Italcementi Group (2008), "sdReport: Sustainable Development Report 2008", available at:
http://www.italcementigroup.com/NR/rdonlyres/BBA55611-8D28-40CC-BE1F-AAAEEB3445ED/0/SdReport_2008_UK.pdf.

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Functional Areas	Sub-categories	Industries
Human Resources	Workforce	Any
KPI record	**Indicator type**	**Unit type**
sK194	smartKPI	#

Name

Management-to-staff ratio

Definition and variations

Definition

Measures the ratio between the number of employees in managerial positions and the headcount of the organization.

Variations

Management span of control
Senior management / executives to employees
Staffing rate - managerial / executive
Supervisors and managers to headcount

Related KPIs

Board size

Tags

workforce, management, staff

Calculation

Subordinate measures used for calculation

A = # Employees in management positions (end of period)
B = # Employees (end of period)

Calculation formula	Formula type	Trend is good when
A/B	Ratio	Within range

Focus

Purpose

To assess the organizational structure and optimize the hierarchical balance.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Monthly	High

Automation fit

Recommended

Limitations

Accurate reporting for this KPI is dependent on a well maintained register of all positions in the organization.

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Targets

Benchmarking fit

Unsuitable

Notes

A high ratio could indicate that a particular department or division is top-heavy. For companies with many layers of management, it may complicate communication and lengthen response time for critical decisions. However, it may also reflect an organizational approach to employee retention and development by providing staff with many managerial level opportunities. A consequence of such a structure are higher salary costs. Professional services organizations generally fall within this category.
A low ratio generally reflects a flat organizational structure; it could also indicate that a company is under-managed. It is also an approach to minimizing salary costs. However it may have negative effects on succession planning, as there are fewer opportunities to prepare the next generation of executives by training them on the job in managerial positions.

Threshold exemple

Red: <0.1; >0.4 Yellow: 0.1-0.2; 0.3-0.4 Green: 0.2-0.3

Analysis and resources

Overall notes

Management-to-staff ratio reflects the career path development outlook, the organizational approach to personnel management, being therefore an important indicator of HR cost containment.

It should be calculated at organizational level as well as for each department or functional area, not just the whole organization.

Further variations of this measure are based on the personal characteristics of the workforce.

Overall, there are various factors that can influence this ratio: industry, organisational structure, combination of job functions, approach to internal talent development and cost constraints.

Additional resources

http://www.bfi.gov.uk/reports/1999/bfi/york/appendices/c1.asp

http://ita.doc.gov/hrm/documents/supervisor_defined.pdf

References

1. Doran et al. (2004), "Impact of the Managerâ€™s Span of Control on Leadership and Performance", available at: http://www.nursingleadership.org.uk/publications/doran2_final.pdf
2. State of Texas, "Management span of control", available at: http://sao.hr.state.tx.us/advisory/FTEMgmntStaffRatio.html
3. United States General Accounting Office (1999), "Social Security Administration: Compliance With Presidential Directive to Reduce Management-to-Staff Ratio", available at: http://archive.gao.gov/paprpdf2/161619.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Talent Development	Any
KPI record	**Indicator type**	**Unit type**
sK4659	smartKPI	#

Name

Certifications per employee

Definition and variations

Definition

Measures the average number of relevant professional certifications held by an employee.

Variations

Certifications per certified employee
Certifications per consultant

Related KPIs

% Training certificates
% IT operations staff with advanced ITIL certification

Tags

staff

Calculation

Subordinate measures used for calculation

Ai = # Certifications owned by employee 'i', where i=1 to n
n = # Employees

Calculation formula	Formula type	Trend is good when
(A1+A2...+An)/n	Average	Increasing

Focus

Purpose

To indicate the quality of technical education, as certifications attest the level of proficiency in a methodology. Certification is usually associated with higher levels of skills and knowledge and establish legitimacy in the relationship with stakeholders.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Input
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Medium

Automation fit

Not recommended

Limitations

Accurate reporting for this KPI is dependent on a well maintained register of certifications. Possessing a certification does not always guarantee highly skilled employees. This measure can be incomplete in some cases.

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Targets

Benchmarking fit

Suitable

Notes

Given the universality of the measure, it suits benchmarking very well. Targets may vary based on the industry. In some industries (i.e. healthcare, law enforcement, call-center) a minimum level of certification is required by law. In others (i.e. manufacturing), certification is required for compliance and as part of quality improvement programs. In professional services, certifications may be beneficial in establishing legitimacy in the relationship with prospective or existing customers.

Threshold exemple

Red: <1 Yellow: 1-3 Green: >3

Analysis and resources

Overall notes

Organizations need to decide which certifications are relevant overall and for individual departments.
A variation of this indicator includes in the calculation only the number of staff members with a certification.

Additional resources

http://www.avanade.com/Documents/Resources/BTS/Customer-Relationship-Management/AOS_ConvergenceIntroduction.pdf

http://www.bigbuilderonline.com/industry-news-print.asp?sectionID=27&articleID=75778

References

1. City of Ventura, California (2005), "Memorandum of Agreement between the County of Ventura and the Service Employees International Union (Local 998)", available at: http://www.dol.gov/olms/regs/compliance/cba/pdf/cbrp2037.pdf#page=39
2. Gilmore et al. (2008), "Salary Survey 2008", available at: http://www.certmag.com/print.php?in=3656
3. State of Louisiana (2010), "LaGov ERP Project Business Blueprint", available at: http://www.doa.louisiana.gov/erp/pdfs/linear.pdf#page=30
4. Thor, C., G. (1995), "Using a Family of Measures To Assess Organizational Performance", National Productivity Review (1986-1998), Vol. 14, No. 3, pp. 111-132

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Functional Areas	Sub-categories	Industries
Human Resources	Efficiency and Effectiveness	Any
KPI record	**Indicator type**	**Unit type**
sK90	smartKPI	$

Name

$ Human Capital Return on Investment (ROI)

Definition and variations

Definition

Measures the return on investing in the human capital of the organization, after adjusting the cost of financial capital.

Variations

$ Human Capital ROI

Related KPIs

$ Human capital value added

Tags

cost, employees

Calculation

Subordinate measures used for calculation

A = $ Revenues
B = $ Operating Expenses
C = $ Compensation & Benefits Costs

Calculation formula	Formula type	Trend is good when
[A-(B-C)]/C	Rate	Increasing

Focus

Purpose

To assess the effectiveness of the investment in human capital in terms of financial returns generated by employees.

BSC perspective	Measurement focus	Impact stage
Financial	Money	Outcome
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Year to date	Monthly	Medium

Automation fit

Recommended

Limitations

This KPI reflects only financial returns and is not capturing intangible assets and other unmeasurable results.

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Targets

Benchmarking fit

Suitable

Notes

There are a number of surveys that provide benchmarking in Human Capital ROI, which are very useful in setting targets and comparing the values with those in the industry. (i.e. Report Sample Ratio - Human Capital ROI, from the Organizational Performance & Effectiveness Section, Canada, 2004).

Threshold exemple

Red: <1.1 Yellow: 1.1-1.5 Green: >1.5

Analysis and resources

Overall notes

The Human Capital ROI reflects all the elements which impact employee productivity, expense and profitability. Essentially, it puts all the employees' impact on company together in one place, by integrating revenue, expense, income, compensation costs and benefits into the formula. This approach is known in the world of finance as a value-based formula.

Additional resources

http://www.bchrma.org/pdf/metrics_trends_09.pdf

References

1. Bontis, N., "Intellectual Capital ROI: A causal map of human capital antecedents and consequents", available at: http://www.business.mcmaster.ca/mktg/nbontis/ic/publications/bontisfitz-enzjic.pdf
2. Hagarty, D. & Wilson C. (2002), "Organizational Performance Measurement and Use of the Balanced Scorecard in Public Sector Corporate Real Estate Organizations (CREOs)", available at: http://cool.coa.gatech.edu:8000/poeSummit/uploads/18/canada_W4_Perf_Measure_LP_1.pdf
3. PricewaterhouseCoopers' Health Research Institute (2007), "What works - Healing the healthcare staffing shortage" available at: http://www.wiche.edu/info/agendaBook/nov07/presentations/Carparelli.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Efficiency and Effectiveness	Any
KPI record	**Indicator type**	**Unit type**
sK89	smartKPI	$

Name

$ Human capital value added

Definition and variations

Definition

Measures the value added through productive activities by the organization's human capital. Reflects the adjusted operating profitability figure calculated by subtracting all expenses except for labor expenses from revenue and dividing the adjusted profit figure by the total headcount.

Variations

$ Financial human capital value added
$ HCVA

Related KPIs

$ Human Capital Return on Investment (ROI)

Tags

human capital

Calculation

Subordinate measures used for calculation

A = $ Revenue
B = $ Operating expense
C = $ Compensation & Benefit cost (Labor cost)
D = # FTEs (or headcount)

Calculation formula	Formula type	Trend is good when
[A-(B-C)]/D	Composition	Increasing

Focus

Purpose

To assess the effectiveness of human capital. It parses out the effects of non human issues and looks at the human impact on revenue.

BSC perspective	Measurement focus	Impact stage
Financial	Money	Outcome
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Year to date	Monthly	High
Automation fit	**Limitations**	
Recommended	It requires integration of both financial and HR metrics. Can be automated by extracting these figures from Enterprise Resource Planning systems.	

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Targets

Benchmarking fit	Notes
Suitable	Targets should be set according to business characteristics, internal HR capabilities and policies in involving HR in measuring business performance, the size of the organization, the industry and business type.

Threshold exemple

Red: <$1,000 | Yellow: $1,000-$1,500 | Green: >$1,500

Analysis and resources

Overall notes

A study conducted by ISR, which is an international employee research and consulting firm revealed that many companies collect metrics related to their human capital, but less than half actively evaluate the impact of their human capital on business performance. In addition, many organizations measuring human capital are still not using their metrics to assist in senior management performance assessments or to improve business performance.

According to a passage from the Human Capital Effectiveness 2007/2008 Report of the Saratoga Institute stating the importance of HR and the optimization of Human Capital: "As the global economy continues to flatten, organizations will need to have an increased focus on talent management, succession planning, retention, and finding new ways to increase productivity in order to outperform their competition. HR departments that align themselves with corporate strategy and goals, and ensure they have access to the necessary expertise, information, and systems to optimize workforce investments will be at a distinct advantage in helping their organizations maximize corporate value".

Additional resources

http://instructor.mstc.edu/instructor/khansen/Human%20Resources/SB14eChap02.ppt
http://www.sba.pdx.edu/faculty/marcian/Ch01.PPT

References

1. North Carolina Healthcare Human Resource Association, "Building a Leadership Legacy", available at: http://www.nchhra.org/files/ROI_NC_HRHA4262001.ppt
2. Pert Chin Ngin (2005), "Applying Human Capital Management to Model Manpower Readiness: A Conceptual Framework", Matser Thesis, available at: http://www.nps.edu/research/HCS/Docs/05Dec_Ngin.pdf
3. Weatherly, L (2006), "The Value of People - The Challenges and Opportunities of Human Capital Measurement and Reporting", SHRM Research Quarterly, available at: http://faculty.washington.edu/janegf/valueofpeople.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Compensation and Benefits	Any
KPI record	**Indicator type**	**Unit type**
sK1863	smartKPI	$

Name

$ Overtime expense per full time equivalent (FTE)

Definition and variations

Definition

Measures the average expenditure for the overtime work on a per full time equivalent (FTE) basis.

Variations

$ Overtime expense per FTE
$ Overtime expense per employee
$ Average overtime expense per FTE

Related KPIs

% Overtime payment rate

Tags

overtime

Calculation

Subordinate measures used for calculation

Ai = $ Overtime expenditure for employee 'i', where i=1 to n
n = # Full time equivalents (FTEs)

Calculation formula	Formula type	Trend is good when
(A1+A2+...+An)/n	Average	Decreasing

Focus

Purpose

To indicate the financial effort regarding the overtime compensation volume paid to personnel.

BSC perspective	Measurement focus	Impact stage
Financial	Money	Output
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Medium

Automation fit

Recommended

Limitations

Accurate calculation of this indicator requires clear reporting of overtime hours and financial data regarding the cost of overtime.

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Targets

Benchmarking fit

Unsuitable

Notes

Targets vary widely according to the industry, the type of business (e.g. seasonal activities for hotels) and the company's policy regarding overtime hours.

Threshold exemple

Red: >1000 Yellow: 300-1000 Green: <300

Analysis and resources

Overall notes

Overtime hours represent the time spent beyond the regularly work schedule. The labor legislation in most countries covers this topic, by establishing a minimum compensation range per overtime hour, higher than regular rates.

Additional resources

Brenna, D., S. (2008), "The construction contracts book: how to find common ground in negotiating the 2007 industry form contract documents", American Bar Association, Chicago, IL

References

1. Massachusetts Government, "Personnel/FTE", available at: http://www.mass.gov/bb/h1/fy11h1/exec_11/hbuddevfte.htm.
2. Ohio Department of Administrative Services (2009), "State of Ohio Workforce Planning Guide 2009", available at: http://wfp.das.ohio.gov/LinkClick.aspx?fileticket=/R8t18prZic%3D&tabid=37.
3. University of Michigan, "Counter Matrix", available at: http://www.mais.umich.edu/groups/download/hrms_piag_dec2009_counter_matrix.pdf.

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Functional Areas	Sub-categories	Industries
Human Resources	Workforce	Any
KPI record	**Indicator type**	**Unit type**
sK9	smartKPI	#

Name

Headcount

Definition and variations

Definition

Measures the number of staff members employed by an organization.

Variations

Total employees
Employees

Related KPIs

$ Working capital per employee

Tags

employees

Calculation

Subordinate measures used for calculation

A = # Employees

Calculation formula	Formula type	Trend is good when
A	Volume	Within range

Focus

Purpose

To provide answer to a simple question: how many employees are there in any branch of the organization. One of the most basic organizational metrics, this information is required in all HR processes.
Headcount is used for internal management and financial reports, as well as external reporting such as 10K or 10Q statements. Headcounts form the basis of many other workforce and company performance ratios, such as Turnover, Cost to Manage and HR Ratios, among others.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Input
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Monthly	High

Automation fit

Recommended

Limitations

Tracking this indicator requires a well maintained HR management system. As a subordinate measure used for the calculation of many other HR performance indicators, an inaccurate headcount leads to inaccurate values for all these related indicators.

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Targets

Benchmarking fit

Unsuitable

Notes

Targets will depend on industry, market and organizational development plans. It is generally used as a dashboard indicator to monitor trends, without having set targets.

Threshold exemple

Red: <1 Yellow: 2-5 Green: >5

Analysis and resources

Overall notes

There are many considerations that can be taken into account when defining headcount. In fact, multiple headcount typologies exist, such as:

1. Headcount by location, very useful in visualizing the distribution of employees and are often required by government regulations. It can also be used to evaluate if the employees are in the places where they are most needed.

2. Headcount by employee status: active, on leave of absence (LOA), independent and retired.

Most organisations only include active employees (including employees on LOA) in their headcount calculations. Although retired and independent employees are sometimes active in HRMS and ERP systems, in order to present an accurate picture of the workforce, these employees are normally excluded from headcount calculations.

3. Headcount by employee type based on the number of hours: full-time, part-time, contractor, on-site.Â

Organisations that rely heavily on on-shore contract staff may choose to run separate headcount reports to highlight the number of people who are on temporary assignments, as well as their distribution across departments and divisions.

Additional resources

http://www.microsoft.com/presspass/press/2009/jan09/01-22fy09q2earnings.mspx

References

1. Marrow, R., Sandler, S., F. & Vaitkus, L. (2009), "Guide to HR Benchmarks 2010", available at: www.ioma.com/issues/downloads/HRBnchmrks10_TOC.php
2. Oracle (2006), "Oracle Human Resources Management Systems", available at: http://download.oracle.com/docs/cd/B34956_01/current/acrobat/120hrdsrug.pdf
3. General Physics Corporation (2006), "Benchmarking for Functional HR Metrics", available at: http://www.gpworldwide.com/quick/nov2006/art3.asp

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Functional Areas	Sub-categories	Industries
Human Resources	Compensation and Benefits	Any
KPI record	**Indicator type**	**Unit type**
sK1858	Key Performance Indicator	#

Name

Compensation satisfaction index

Definition and variations

Definition

Measures the employees' satisfaction level with the compensation packages received for the work performed.

Variations

Employees compensation satisfaction index

Related KPIs

Performance based pay differential

Tags

compensation

Calculation

Subordinate measures used for calculation

Rating satisfaction can be applied on compensation components:
A = # Base compensation rating
B = # Variable compensation rating
C = # Overtime compensation rating
D = # Bonuses rating
E = # Allowances rating

Calculation formula	Formula type	Trend is good when
Survey	Index	Increasing

Focus

Purpose

To indicate the effect of compensation packages and its influence upon workers as a motivating or demotivating factor.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Qualitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Low

Automation fit

Not recommended

Limitations

The accuracy of data is limited by respondents' subjectivity, as the results are based on surveys.

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Targets

Benchmarking fit

Suitable

Notes

The threshold examples may be expressed in points (100 maximum). Targets may vary based on industry, trends on the workforce market, employee's profile, compensation policy and especially on the measuring scales used to assess the survey.

Threshold exemple

Red: <60 Yellow: 60-80 Green: >80

Analysis and resources

Overall notes

This indicator may be very relevant particularly when the companies apply changes regarding the internal compensation policy or when internal promotion rate is reaching a high level.

A workforce plan should include also the compensation strategy and a questionnaire is generally used for measuring the employees' satisfaction level with the salaries. Unsatisfactory compensation level can demotivate employees, even to the point where they leave the organization motivated by a higher compensation level.

Additional resources

http://www.jstor.org/pss/25092240

http://www.jstor.org/pss/2488408

References

1. Premrajan, Rao, E., M. & Gurunathan, L. (2007), "A study of Estimating Cost to Government For a government employee", available at: http://india.gov.in/govt/studies/xlri_compensation.pdf
2. State of Washington (2008), "Guide to Developing Strategic Workforce Plans", available at: http://www.dop.wa.gov/SiteCollectionDocuments/Strategic%20HR/Workforce%20Planning/GuidetoDevelopingStrategicWorkforcePlans.pdf
3. Al-Shami, M.M. & Ghneim, M.Y. (2002), "Employees Benefits Pay Satisfaction in the Banking System in Palestine: An Empirical Study", available at: http://www.najah.edu/researches/34.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Compensation and Benefits	Any
KPI record	**Indicator type**	**Unit type**
sK86	smartKPI	$

Name

$ Bonus payout

Definition and variations

Definition

Measures the average bonus paid to employees during a given time period, in recognition and appreciation of their performance.

Variations

$ Bonus payout per employee
$ Annual bonus amount

Related KPIs

$ Discretionary accrual

Tags

compensation, bonus

Calculation

Subordinate measures used for calculation

A = $ Bonus payout amount
B = # Employees

Calculation formula	Formula type	Trend is good when
A/B	Average	Increasing

Focus

Purpose

To reflect the recognition of the employee's efforts to achieve results. Financial rewards are generally linked to the individual performance management system. They are a strong motivational instrument used to ensure targets are met and to encourage employee retention.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Money	Outcome
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Quarter	Quarterly	High

Automation fit

Recommended

Limitations

Financial rewards to employees require an effective individual performance management system (based on appraisals). Reporting is generally on a quarterly basis, biannually or annually.

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Targets

Benchmarking fit

Unsuitable

Notes

Bonus levels can start from 5-10% of the salary up to 150-200%. Targets and calculation can differ according to the market, to the organization's policies, the department (sales and HR bonus level can differ) and so on.
Well established HR systems of performance appraisal should make the process transparent and clear for all employees and should be agreed with the management.
In most industries, the targets are similar and depend on salary. Exceptions include the high-technology and investment banking industries. In nonprofit organizations and healthcare, bonuses remain rare.

Threshold exemple

Red: <$5,000 Yellow: $5,000-$10,000 Green: >$10,000

Analysis and resources

Overall notes

Annual incentive bonuses are meant to be motivational. They are designed to reward employees for fulfilling their responsibilities and for delivering superior results. Bonus targets and their associated payouts reflect a range of expected levels of performance.

This KPI has the advantage of motivating employees, when targets are jointly set by the employee and management and they work for achieving the results. It is very important especially in sales processes. Bonuses encourage strong sales performance.

The disadvantage of this KPI is that employees may feel discriminated against or unfairly treated, or evaluators may be subjective.

Additional resources

http://www.ncbi.nlm.nih.gov/pubmed/10152699

http://www.dhrm.virginia.gov/publications/ahrs/jan08/home.htm

https://www.cms.gov/HealthCareFinancingReview/downloads/07Fallpg5.pdf

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2. Inman, P. (2009), "Goldman to make record bonus payout", The Observer, available at: http://www.guardian.co.uk/business/2009/jun/21/goldman-sachs-bonus-payments
3. Ministry of Finance, Malaysia (2004), "IMPLEMENTATION OF PERFORMANCE-LINKED COMPENSATION (PLC) IN GOVERNMENT-LINKED COMPANIES (GLCs)", available at: http://www.pcg.gov.my/pdfdocument/3.%20BlueBook-PLC_KPI.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Compensation and Benefits	Any
KPI record	**Indicator type**	**Unit type**
sK1855	Key Performance Indicator	$

Name

$ Average hourly FTE compensation rate

Definition and variations

Definition

Measures the average compensation paid by the employer for every working hour completed by a full time equivalent (FTE).

Variations

$ Average FTE hourly rate

Related KPIs

% Compensation packages with pay-for-performance arrangements

Tags

compensation, employees

Calculation

Subordinate measures used for calculation

A = $ Compensation expense
B = # Working hours

Calculation formula	Formula type	Trend is good when
A/B	Average	Increasing

Focus

Purpose

To indicate the true compensation cost per hour worked by a Full Time Equivalent as a guide for analysis and planning.

BSC perspective	Measurement focus	Impact stage
Financial	Money	Output
Indicator focus	**Measurment type**	**Level**
Lagging	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Quarter	Quarterly	High
Automation fit	**Limitations**	
Recommended	Accurate reporting for this KPI is dependent on a well maintained compensation reporting system.	

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Targets

Benchmarking fit	Notes
Suitable	Threshold examples may vary according to the industry, country, specialty etc. This indicator can be calculated also per job position, taking into account the number of work hours. Given the universality of the measure, it suits benchmarking very well.

Threshold exemple

Red: >4000 Yellow: 1000-4000 Green: <1000

Analysis and resources

Overall notes

Being an average, this indicator is limited by giving a narrow perspective upon compensation, without being very specific. However,Â this measure may reflect the compensation level more accurate when applied and cascaded per job position, functional area, department, etc.

Additional resources

http://www.cbs.gov.il/reader/yarhon/yarmenu_e_new.htmlÂ

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2. United States Department of Labour (2008), "International Comparisons of Hourly Compensation Costs in Manufacturing, 2008", available at: http://www.bls.gov/news.release/ichcc.nr0.htm
3. Washington State Department of Labour & Industries (2010), "Rates for Workers' Compensation", available at: http://www.lni.wa.gov/ClaimsIns/Files/Rates/2011ProposedRatesByBusTypeClassCode.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Compensation and Benefits	Any
KPI record	**Indicator type**	**Unit type**
sK85	smartKPI	#

Name

Entry level wage to local minimum wage

Definition and variations

Definition

Measures the company's entry level wage compared with the local minimum wage at significant locations of operation.

Variations

Ratio of entry level wage in the organization compared to local minimum wage

Related KPIs

% Total compensation revenue rate

Tags

wage, work compensation

Calculation

Subordinate measures used for calculation

A = $ Standard level wage in the organization
B = $ Local minimum wage

Calculation formula	Formula type	Trend is good when
A/B	Ratio	Increasing

Focus

Purpose

To reflect how the company is aligned to the market from a wage perspective, as a negative correspondence can lead to employee turnover.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Money	Input
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Biannually	Medium
Automation fit	**Limitations**	
Not recommended	Accurate reporting requires access to up-to-date statistics on the level of local wages.	

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Targets

Benchmarking fit

Suitable

Notes

Targets depend on the organization's policy regarding wage levels, the position level (entry, management level), the company's reputation on the market, its retention rate among employees and its HR policies.
Each company should have a HR salary policy that among others, establishes a standard entry level wage for different types of jobs. These wages will be then compared with the local minimum wage, information that is available through market studies and statistics.

Threshold exemple

Red: <1 Yellow: 1-1.2 Green: 1.2-1.4

Analysis and resources

Overall notes

The standard entry level wage is a norm established by the organization, based on the market wage for the specific job, the value of the work done, and the company policy regarding compensations and benefits.

Economic well-being is one of the ways in which an organization invests in its employees. This indicator helps demonstrate how an organization contributes to the economic well-being of employees in significant locations of operation.

The indicator also provides an indication of the competitiveness of the organization’s wages and information relevant for assessing the effect of wages on the local labor market. Offering wages above the minimum can be one factor in building strong community relations, employee loyalty and strengthening an organization’s social license to operate.

This indicator is most relevant for organizations in which a substantial portion of their workforce is compensated in a manner or scale that is closely linked to laws or regulations on minimum wage.

Additional resources

http://www.acclimited.com/newsite/pdf/report_25_jul_2008/Complete%20Report.pdf

http://www.steelcase.com/en/company/who/corporate-responsibility/pages/gri.aspx

http://www.mosaicco.com/sustainability/report/gri/economic.html

http://www.praxair.com/praxair.nsf/0/78D566FE5F2733FF8525764A00684828/$file/Praxair+2010+Sustainable+Development+Report.pdf

http://www.allstate.com/Allstate/content/refresh-attachments/Allstate_SR_Report_2009.pdf

References

1. Global Reporting Initiative, "Indicator Protocols Set: EC", available at:
http://www.globalreporting.org/NR/rdonlyres/B52921DA-D802-406B-B067-4EA11CFED835/3883/G3_IP_Economic.pdf
2. Axel Springer, "Management Approach and Economic Performance Indicators", available at:
http://www.axelspringer.de/en/artikel/cw_artikel_nv_en_207694.html
3. ACC Limited, "Methodology and GRI Content Index", available at:
http://www.acclimited.com/newsite/pdf/Methodology%20and%20GRI%20Content%20Index.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Working Environment	Any
KPI record	**Indicator type**	**Unit type**
sK1955	smartKPI	%

Name

% Unscheduled absence rate

Definition and variations

Definition

Measures the percentage of unscheduled absence days out of the total number of workdays available. Unscheduled absences occur when notification of an absence is anytime less than 24 hours.

Variations

% Unscheduled absence
% Absence rate
% Unscheduled absenteeism

Related KPIs

Industrial dispute absence days per full time equivalent (FTE)

Tags

absenteeism, workforce

Calculation

Subordinate measures used for calculation

A = # Unscheduled absence days
B = # Workdays available

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Decreasing

Focus

Purpose

To indicate the rate of unplanned absenteeism among employees, in order to further analyze its impact upon the company's cost, labor productivity and customer service delivery.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Medium
Automation fit	**Limitations**	
Recommended	Accurate reporting for this KPI is dependent on a well maintained absence reporting system.	

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Targets

Benchmarking fit

Unsuitable

Notes

Targets may vary based on the industry, the business characteristics and work program flexibility. Excessive unscheduled absences may result in disciplinary action up to and including termination.

Threshold exemple

Red: >5%
Yellow: 2-5%
Green: <2%

Analysis and resources

Overall notes

Some industries are more affected by unplanned absenteeism than others. It can be the case of the food service industry, for example, where each employee has his own place in the services flow and his replacement, although compulsory to complete the flow, may not be done so as to deliver the service on time. In other cases, such as professional services, unplanned absenteeism might not have such great effects, as meetings or delivery of services can usually be postponed.

Additional resources

http://www.cch.com/absenteeism2007/

http://www.reliableplant.com/Read/3134/unscheduled-absenteeism-on-rise-at-us-workplaces-

References

1. Cch.com (2007), "CCH 2007 Unscheduled Absence Survey", available at: http://www.cch.com/press/news/2007/20071010h.asp.
2. Department of Administrative Services, State of Connecticut, "HR Metrics", available at: http://www.das.state.ct.us/HR/Strategic_Planning/HR_Metrics.pdf.
3. Segalsibson.com, "Healthy Campus Survey: Second Report of Results", available at: http://www.segalsibson.com/publications/surveysandstudies/healthycampus2.pdf.
4. University of Huston, "Staff Attendance and Punctuality", available at: http://prtl.uhcl.edu/portal/page/portal/HR/POLICIES_PROCEDURES/ATTENDANCE
5. McGladrey, R., S., M. (2008), "Mandated Benefits 2008 Compliance Guide", Aspen Publishers, US

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Functional Areas	Sub-categories	Industries
Human Resources	Working Environment	Any
KPI record	**Indicator type**	**Unit type**
sK1933	smartKPI	#

Name

Lost time injury frequency rate

Definition and variations

Definition

Measures the number of work related incidents generating time loss that are occurring per one million hours worked.

Variations

LTIFR
Lost time injury frequency

Related KPIs

% Staff with adequate occupational health and safety (H&S) training
# Work related injury return ratio

Tags

health and safety

Calculation

Subordinate measures used for calculation

A = # Work related incidents that result in lost time
B = # Man hours worked

Calculation formula	Formula type	Trend is good when
A*1,000,000/B	Rate	Decreasing

Focus

Purpose

To indicate the organization's ability to operate securely and protect its personnel against injuries and fatalities.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Quality	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Medium

Automation fit

Not recommended

Limitations

Accurate reporting for this KPI is dependent on a well maintained tracking system used to monitor the work related incidents resulting in lost time.

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Targets

Benchmarking fit	Notes
Suitable	The targets may vary according to the industry, health and safety risks due to the business, exposure time to risks, measurement period etc. For example, the marine industry exposure time (hours) is considered the cumulative time of active service on a vessel including both service hours on board and spare hours on board.

Threshold exemple

Red: >15 Yellow: 5-15 Green: <5

Analysis and resources

Overall notes

Lost time injury frequency rate is mainly monitored by companies which undertake activities involving a high degree of health and safety risk for the workforce.

Additional resources

http://www.workcover.tas.gov.au/__data/assets/pdf_file/0003/89607/lost_time_05-06.pdf

References

1. Wesfarmers Sustainability Report (2009), "Bunnings - Performance", available at: http://www.wesfarmers.com.au/sustainabilityreport2009/bunnings.html
2. Department of Consumer and Employment Protection (2008), "Toolbox presentation: Safety performance in the Western Australian mineral industry 2006â€“07", available at: http://www.dmp.wa.gov.au/documents/Powerpoint%20presentations/MSIA_Res_28ToolboxSafetyPerform06_07.ppt
3. OHS Branch, Human Resources Division (2006), "ANU OHS Performance Report -2006", available at: http://info.anu.edu.au/hr/OHS/Performance_Appraisal/OHS%20Performance%202006%20-%20Final.doc

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK1836	smartKPI	#

Name

Employee engagement index

Definition and variations

Definition

Measures the engagement level of employees in their work activities and responsibilities in terms of enthusiasm, commitment and discretionary effort.

Variations

Employee engagement

Related KPIs

% Adherence to values and mission

Tags

engagement

Calculation

Subordinate measures used for calculation

A = # Employee engagement
Surveys assessing employee engagement are usually tailored to each organization.
They use structured questioning to assess employee discretionary effort and whether they find their work stimulating.

Calculation formula	Formula type	Trend is good when
A, based on survey	Index	Increasing

Focus

Purpose

To indicate the level of engagement and commitment of employees, as this impacts turnover rates and leads to superior customer service.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Low

Automation fit

Not recommended

Limitations

The accuracy of data can be limited by respondents' subjectivity, as the calculation of this indicator is based on survey results.

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Targets

Benchmarking fit

Unsuitable

Notes

The threshold example is expressed in points (100 maximum) and has just an exemplification purpose. Organizations construct various scales to measure employee engagement and targets can vary from one industry to another depending on the employees' profile. Younger employees are usually more susceptible to enthusiasm and commitment problems.

Threshold exemple

Red: <75 Yellow: 75-95 Green: >95

Analysis and resources

Overall notes

There are studies that suggest employee engagement can be driven by various company efforts, such as facilitating the development of skills for the employees, giving them a sense of trust and integrity and clarifying their opportunities for future career development.

Additional resources

Gibbons, J., (2006), "Employee Engagement A Review of Current Research and Its Implications", The Conference Board of Canada Report, Ottawa, CA

http://www.smartkpis.com/blog/2010/03/03/employee-engagement-index/

http://www.smartkpis.com/blog/2011/01/28/employee-engagement-at-western-union-malaysia-%E2%80%93-a-case-study/

http://www.burke.com/services/eerm/services.cfm?id=233

References

1. Crabtree, S. (2004), "Getting Personal in the Workplace", The Gallup Management Journal, available at: http://govleaders.org/gallup_article_getting_personal.htm
2. Motorola, (2004), "Motorola Engagement Survey", CEO Metrics and Analytics Network, available at: http://www.marshall.usc.edu/assets/037/8706.pdf
3. Vancity (2003), "Employee engagement index: breakdown of questions", available at: https://www.vancity.com/AboutUs/OurBusiness/OurReports/AccountabilityReport/0203AccountabilityReport/CommitmentFour/EmployeeEngagementIndex

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Functional Areas	Sub-categories	Industries
Human Resources	Retention	Any
KPI record	**Indicator type**	**Unit type**
sK5912	smartKPI	#

Name

Employee satisfaction

Definition and variations

Definition

Measures the employees' satisfaction and motivation level with aspects regarding the job and working environment: job responsibilities, team and management, workplace and professional development.

Variations

Satisfaction level among employees
Average employee satisfaction

Related KPIs

Employee advocacy for products and services

Tags

satisfaction

Calculation

Subordinate measures used for calculation

A = # Employee satisfaction
Surveys assessing employee satisfaction are usually tailored to each organization. They use structured questioning to investigate employee satisfaction a

Calculation formula	Formula type	Trend is good when
A, based on survey	Index	Increasing

Focus

Purpose

To indicate the level of satisfaction and motivation of employees, as high levels of satisfaction lower turnover rates, leading to higher performance and superior customer service.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Low

Automation fit

Not recommended

Limitations

The accuracy of data can be limited by respondents' subjectivity, as the data is based on survey results.

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Targets

Benchmarking fit

Unsuitable

Notes

The threshold examples can be expressed as percentage or points (100 maximum). HR managers use various scales to measure employee satisfaction based on customized survey, and targets can vary from one organization to another. Younger employees are usually more motivated towards their jobs and work.
Benchmarking of this KPI is not recommended, due to the variety of questions used by organizations in their surveys.

Threshold exemple

Red: <60% Yellow: 60-80% Green: >80%

Analysis and resources

Overall notes

Studies suggest a direct correlation between employee satisfaction and increased performance on customer satisfaction, even on financial results.

An interesting analysis of employee satisfaction was published by Fortune Magazine in 1997. Based on a 820-store survey conducted by Sears to determine the impact of employee attitude on the bottom line, it showed that improving employeesâ€™ attitudes with 5 point generated a 1.3 point improvement in customer satisfaction, which further yielded an improvement in revenue by 0.5%.

Additional resources

http://alignment.wordpress.com/2007/01/09/measuring-employee-satisfaction/Â

http://dot.alaska.gov/comm/about/assets/DOT-Report-to-Staff.pdf

http://www.superiorcourt.maricopa.gov/AdultProbation/docs/ESSResults02.pdf

References

1. InBev (2008), "Citizenship '08", available at: http://www.ab-inbev.com/pdf/InBev_corpo_citizenship08.pdf
2. Sherman S. & Rucci A. (1997), "Bringing Sears into the new world", Fortune Magazine, available at: http://money.cnn.com/magazines/fortune/fortune_archive/1997/10/13/232506/index.htm
3. Yee R. W. Y., Yeung A. C. L. & Cheng T .C. E. (2008), "The Impact of Employee Satisfaction on Quality and Profitability in High-contact Service Industries", Journal of Operations Management 26, available at: http://repository.lib.polyu.edu.hk/jspui/bitstream/10397/627/1/JOM%20%28Accepted%29.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Working Environment	Any

KPI record	Indicator type	Unit type
sK6273	smartKPI	#

Name

Employee advocacy for products and services

Definition and variations

Definition

Measures, using a Net Promoter Score (TM) approach, the degree to which committed employees are willing to recommend the products and services of the organization to family, friends and colleagues.

Variations

Staff advocacy for products and services
Employee advocacy for the organization's products and services

Related KPIs

% Employee satisfaction

Tags

advocacy, recommend

Calculation

Subordinate measures used for calculation

Question: On a scale of 0-10, how likely is it that you would recommend the products or services of your employer [company X] to a friend or colleague?
A = # Promoters out of respondents
B = # Detractors out of respondents
C = # Employees that responded to the survey

Calculation formula	Formula type	Trend is good when
(A/C)*100-(B/C)*100	Rate	Increasing

Focus

Purpose

To provide an internal assessment of the perceived quality of products and services from the perspective of employees.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome

Indicator focus	Measurment type	Level
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Medium

Automation fit

Not recommended

Limitations

Data gathering for this KPI is survey based. Due to cost and time limitations, most organizations include such a question in the yearly staff poll. A quarterly frequency can be achieved by using a simple pulse survey with a limited number of questions (advocacy, engagement and satisfaction).

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Targets

Benchmarking fit

Suitable

Notes

As it is a standard question, results are suitable to benchmarking. Targets should be set in accordance to the specifics of the organization (workforce profile, stage of development, etc.).

Threshold exemple

Red: <-10 Yellow: -10-0 Green: >0

Analysis and resources

Overall notes

A Forrester study "Do your employees advocate for your company?" published in November 2010 revealed some interesting results for employee job advocacy. Over 5,500 global information workers were surveyed using the NPS methodology. In North America and Europe the score was-23%. In this instance, 49% are detractors, 24% neutrals, and 27% promoters.

Additional resources

http://www.forrester.com/rb/Research/do_employees_advocate_for_company/q/id/57945/t/2Â

http://www.slideshare.net/kevinthomson106/ukar-2010-2011-the-employee-advocacy-rating

http://www.cipd.co.uk/subjects/empreltns/general/empengmt.htm

http://blogs.forrester.com/matthew_brown/10-11-22-employee_advocates_emerge_from_empowered_workforce

References

1. Brown M. (2010), "Forrester: Do your employees advocate for your company?", article on ComputerWeekly.com, available at: http://www.computerweekly.com/Articles/2010/12/03/244324/Forrester-Do-your-employees-advocate-for-your-company.htm
2. MacLEOD, D. and CLARKE, N. (2009), "Engaging for success: enhancing performance through employee engagement", London: Department for Business, Innovation and Skills, available at: http://www.berr.gov.uk/whatwedo/employment/employee-engagement/index.html
3. Marsden P., Samson A. and Upton N. (2005), "Advocacy Drives Growth - Customer Advocacy Drives UK Business Growth", paper submitted to the Brand Strategy Journal, available at: http://www.waltercarl.neu.edu/PDFs/colleagues/LSE_AdvocacyDrivesGrowth.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Working Environment	Any

KPI record	Indicator type	Unit type
sK6434	smartKPI	#

Name

Employee advocacy for the organization as an employer

Definition and variations

Definition

Measures, using a Net Promoter Score (TM) approach, the degree to which committed employees are willing to recommend the organization to family, friends and colleagues.

Variations

Employee advocacy for the organization as employer of choice
Employee advocacy for the employer as a workplace
Staff advocacy for the employer as a workplace
Advocacy for job referrals

Related KPIs

Employee advocacy for products and services

Tags

advocacy, employer of choice, recommend

Calculation

Subordinate measures used for calculation

Question: On a scale of 0-10, how likely is it that you would recommend working for [company X] to a friend or colleague?
A = # Promoters out of respondents
B = # Detractors out of respondents
C = # Employees that responded to the survey

Calculation formula	Formula type	Trend is good when
(A/C)*100-(B/C)*100	Rate	Increasing

Focus

Purpose

To reflect the quality of the working environment, complementing other KPIs such as # Employee satisfaction and # Employee engagement index.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Satisfaction	Outcome

Indicator focus	Measurment type	Level
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Quarterly	Medium

Automation fit

Not recommended

Limitations

Data gathering is survey based. Due to cost and time limitations, most organizations include such a question in the yearly staff poll. A quarterly frequency can be achieved by using a simple pulse survey with a limited number of questions (advocacy, engagement and satisfaction).

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Targets

Benchmarking fit

Suitable

Notes

As it is a standard question, results are suitable to benchmarking. Targets should be set in accordance to the specifics of the organization (workforce profile, stage of development, etc.).

Threshold exemple

Red: <-10 Yellow: -10-0 Green: >0

Analysis and resources

Overall notes

A Forrester study "Do your employees advocate for your company?" published in November 2010 revealed some interesting results for employee job advocacy. Over 5,500 global information workers were surveyed using the Net Promoter Score (TM) methodology. In North America and Europe the score was -16%. In this instance, 43% are detractors, 29% neutrals, and 27% promoters.

Additional resources

http://www.forrester.com/rb/Research/do_employees_advocate_for_company/q/id/57945/t/2

http://www.slideshare.net/kevinthomson106/ukar-2010-2011-the-employee-advocacy-rating

http://www.cipd.co.uk/subjects/empreltns/general/empengmt.htm

http://blogs.forrester.com/matthew_brown/10-11-22-employee_advocates_emerge_from_empowered_workforce

References

1. Marsden P., Samson A. and Upton N. (2005), "Advocacy Drives Growth - Customer Advocacy Drives UK Business Growth", paper submitted to the Brand Strategy Journal, available at: http://www.waltercarl.neu.edu/PDFs/colleagues/LSE_AdvocacyDrivesGrowth.pdf
2. Brown M. (2010), "Forrester: Do your employees advocate for your company?", article on ComputerWeekly.com, available at: http://www.computerweekly.com/Articles/2010/12/03/244324/Forrester-Do-your-employees-advocate-for-your-company.htm
3. MacLEOD, D. and CLARKE, N. (2009), "Engaging for success: enhancing performance through employee engagement", London: Department for Business, Innovation and Skills, available at: http://www.berr.gov.uk/whatwedo/employment/employee-engagement/index.html

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Functional Areas	Sub-categories	Industries
Human Resources	Efficiency and Effectiveness	Any
KPI record	**Indicator type**	**Unit type**
sK769	smartKPI	%

Name

% Performance appraisals completed on time

Definition and variations

Definition

Measures the proportion of employee performance appraisals completed as scheduled, from the total number of appraisals due.

Variations

% Appraisals completed on time
% Performance evaluations completed on time

Related KPIs

% Performance rating distribution

Tags

evaluation

Calculation

Subordinate measures used for calculation

A = # Performance appraisals completed on time
B = # Performance appraisals due

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Increasing

Focus

Purpose

To assess the efficiency and effectiveness of the performance evaluation process.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Process
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Spot	Monthly	Low

Automation fit

Not recommended

Limitations

Accurate reporting requires a well functional HR management system to track performance appraisals' status at any point. While it is a direct measure of volume in the process of performance appraisal, it is only an indirect measure for the quality of evaluation processes.

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Targets

Benchmarking fit

Suitable

Notes

For compliance purposes, the achievement of the target set for this KPI is essential. While 100% is difficult to achieve due to staff leave, 90% achievement should be a minimum target.

Threshold exemple

Red: <75% Yellow: 75-90% Green: >90%

Analysis and resources

Overall notes

At individual level, performance measurement through employee appraisals and reviews is one of the most commonly found HR management processes. Managers and HR coordinators assess periodically the performance of employees using a structured process such as a formal performance appraisal.

Additional resources

http://www.usfa.dhs.gov/pdf/efop/efo41107.pdf

http://onlinelibrary.wiley.com/doi/10.1111/j.1748-8583.2001.tb00046.x/abstract

http://tower.excelahealth.org/Helpfiles/185445-WorkingTogetherPerformanceMgmt2009.pdf

http://www.integratingperformance.com/pages/individual-level/analysis/

http://nciph.sph.unc.edu/accred/health_depts/materials/GuidanceDocument7-1-08.pdf

http://personnel.ky.gov/NR/rdonlyres/C0D4C41B-F6AB-4B74-BC5E-EDB2B88AFB46/0/EvaluateYourPerformanceManagementProcess.pdf

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1. Carolina College of Health Sciences (2007), "Annual Report 2007", available at: http://www.carolinascollege.edu/PDF/Annual_Report2007.pdf
2. NC Office of State Personnel (2008), "Evaluate your performance management process", available at: http://www.performancesolutions.nc.gov/motivationinitiatives/performancemgmt/ReinventingPerformanceManagement/evaluate.aspx
3. Redland Shire Council (2005), "Operational Plan 2004/05", available at: http://web01.redland.qld.gov.au/robo/Minutes_Agendas/MinutesAgendas04/June/Agendas/16_June_Finance_Corporate_Management/Agenda_June_16_04_Finance_Corporate_Management_files/Operational_Plan_2004-2005.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Talent Development	Any
KPI record	**Indicator type**	**Unit type**
sK692	Key Performance Indicator	%

Name

% Training penetration rate

Definition and variations

Definition

Measures the percentage of employees that completed a form of training, out of the total number of employees in the organization.

Variations

% Training penetration rate - leadership
% Training penetration rate - branch location
% Training penetration rate - customer service

Related KPIs

Time in training

Tags

training

Calculation

Subordinate measures used for calculation

A = # Employees that have completed training
B = # Headcount

Calculation formula	Formula type	Trend is good when
(A/B)*100	Rate	Increasing

Focus

Purpose

To monitor the spread of training across the organization and avoid concentration.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Volume	Output
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Operational

Data profile

Data capture period	Standard reporting frequency	Data integrity
Month	Monthly	Low

Automation fit

Not recommended

Limitations

Accurate reporting requires a well-maintained register of training across the organization.

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Targets

Benchmarking fit

Suitable

Notes

Although a high result (close to 100%) is often the desired level for this measure, especially for required training courses, few organizations achieve such results.

Threshold exemple

Red: <50%
Yellow: 50-90%
Green: >90%

Analysis and resources

Overall notes

This KPI may be analyzed by employee or job characteristics to identify areas with low training penetration rates for intervention. Dimensions for such analysis may include organizational unit, geography, job function, job family, employment level, tenure, age, and performance rating.

Additional resources

http://www.mais.umich.edu/groups/download/hrms_piag_dec2009_counter_matrix.pdf

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1. Collins, S. (2009), "Performance Analytics", available at: http://hcms.hardhatcreative.com.au/uploads/00819.pdf
2. Department of Corrections, Office of Financial Management, State of Washington, (2007), "Activity Inventory Performance Measure Assessment", available at: http://www.ofm.wa.gov/performance/assessments/docassessment.pdf
3. KCB Bank Group (2009), "Individual Balanced Scorecard", available at: http://www.kcbbankgroup.com/ke/images/stories/micro/sampleperformanceappraisaform.pdf

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Functional Areas	Sub-categories	Industries
Human Resources	Talent Development	Any
KPI record	**Indicator type**	**Unit type**
sK6	smartKPI	$

Name

$ Training investment per full time equivalent (FTE)

Definition and variations

Definition

Measures the average amount spent on training for each Full Time Equivalent (FTE). An FTE of 1.0 is equivalent to a full-time worker.

Variations

$ Training cost per employee
$ Average training investment per full time equivalent (FTE)
$ Average training cost per full time equivalent (FTE)

Related KPIs

Time in training

Tags

training, cost

Calculation

Subordinate measures used for calculation

A = $ Total training investment in staff learning and education
B = # FTEs

Calculation formula	Formula type	Trend is good when
A/B	Average	Increasing

Focus

Purpose

To assess and monitor the level of organizational investment in staff training.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Money	Input
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Rolling average	Quarterly	Low

Automation fit

Not recommended

Limitations

It is difficult for large organizations to coordinate the tracking of staff training. Accuracy in monitoring the cost of training and number of participants is a prerequisite of using this KPI.

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Targets

Benchmarking fit

Suitable

Notes

An American Society for Training and Development (ASTD) study found the following:
The average annual expenditure per employee in ASTDâ€™s sample of large organizations (BMF) increased to $1,424 per employee in 2005, an increase of 4% from the previous year. Average expenditure per employee in the sample of BEST organizations increased 3.7 percent to $1,616 in 2005.
For BMF organizations in 2005, expenditure as a percentage of payroll did not change from the previous year, remaining at 2.20 percent. The average expenditure as a percentage of payroll in 2005 BEST Award winners was lower in 2005, at 2.72 percent, than in 2004 (2.86 percent).
The average number of hours of formal learning per employee in BMF organizations increased from 35 hours per employee in 2004 to 41 hours per employee in 2005. In BEST organizations, the average number of learning hours per employee rose from 36 in 2004 to 43 in 2005.

Threshold exemple

Red: <700; >1,500 Yellow: 700-1,000; 1,200-1,500 Green: 1,000-1,200

Analysis and resources

Overall notes

Training costs usually refer to:

- Development costs (e.g., salaries and benefits of personnel, equipment).

- Direct implementation costs (e.g., training materials, technology costs, facilities, travel, equipment, instructorâ€™s salary and benefits).

- Indirect implementation costs (e.g., overhead, general and administrative).

- Compensation for participants.

- Lost productivity or costs of â€œbackfillingâ€• positions during training.

Additional resources

http://www.pinnaclepeo.com/blog-sources/HR-Metrics-Kit.pdf

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2. Society for Human Resource Management (2006), "Training Cost per Employee", SHRM Metric of the Month, available at: http://www.shrm.org/Research/Articles/Articles/Pages/MetricoftheMonthTrainingCostPerEmployee.aspx
3. Sugrue, B., & Rivera, R. J. (2005), "State of the industry: ASTDâ€™s annual review of trends in workplace learning and performance", Alexandria, VA.

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Functional Areas	Sub-categories	Industries
Human Resources	Talent Development	Any
KPI record	**Indicator type**	**Unit type**
sK250	smartKPI	%

Name

% Training return on investment

Definition and variations

Definition

Measures the report between net benefit and costs per training program.

Variations

% Training ROI

Related KPIs

$ Training investment per customer

Tags

cost, training, roi

Calculation

Subordinate measures used for calculation

A = $ Costs per training program
B = $ Benefits per training program

Calculation formula	Formula type	Trend is good when
[(B-A)/A]*100	Rate	Increasing

Focus

Purpose

To track the efficiency and effectiveness of training programs and their value generated for the organization.

BSC perspective	Measurement focus	Impact stage
Learning & Growth	Money	Outcome
Indicator focus	**Measurment type**	**Level**
Leading	Quantitative	Strategic

Data profile

Data capture period	Standard reporting frequency	Data integrity
Rolling average	Quarterly	Low

Automation fit

Not recommended

Limitations

Robust training program management systems should be in place to enable data tracking and reporting of training ROI.

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Targets

Benchmarking fit

Unsuitable

Notes

Targets should be set considering the specifics of training and participant's former performance and skills developed during the program.
A high training ROI indicates a successful program that had applicability and brought results to the organization.

Threshold exemple

Red: <90% Yellow: 90-110% Green: >110%

Analysis and resources

Overall notes

ROI is the added value created from an investment in terms of cost saving, cost avoidance or income generation.

Training ROI outlines the financial benefits delivered to an organization as a result of the training or development intervention, in addition to other benefits.

Involvement of the training company in measuring ROI reflects on the maturity of the training program offered, however training ROI measurement is dependent on internal data and resourcing for calculation and reporting.

Additional resources

http://www.doeal.gov/qtd/internet/trn-conf/tc-presentations/traderoi.ppt

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2. Munoz, M., D. & Munoz, M., A. (1997), "Evaluating Training: Return on Investment and Cost-Benefit Analysis", available at: http://www.eric.ed.gov/PDFS/ED471457.pdf
3. Phillips, J., J (2007), "Measuring ROI in Human Resources
Calculating the Impact of ROI on HR Programs", available at: http://media.roiinstitute.net/pdf/uploads/Webcast_Measuring_ROI_in_Human_Resources_Programs_Conference_Board.pdf

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Appendix A: Glossary of Terms

The following list provides an explanation of several popular terms characterizing KPIs:

Rate – A specific type of ratio expressed in many cases as part to whole. Examples of rates are the natality or mortality rate, expressed as the number of births or deaths per a certain number of population or the currency exchange rate, where the value of one currency is compared to the value of the other currency.

Ratio – A relation between two measures that might be distinct, but which are part of the same category of elements, such as the ratio of boys to girls, teachers to students, doctors to patients, revenues to expenditure.

Composition – A composite indicator is formed when individual indicators are compiled into a single index, on the basis of an underlying model of the multi-dimensional concept that is being measured. It measures multi-dimensional concepts (e.g. competitiveness, e-trade or environmental quality) which cannot be captured by a single indicator.

Index – A number computed from a specific formula or calculation methodology, used to characterize a complex set of data.

Leading – Drive the performance of the outcome indicators, being predictors of success or failure. Examples of leading indicators are: "% Employees involved in the innovation process", "% Conversion rate" or "% Inventory quality ratio (IQR)".

Lagging – Type of indicators that reflect the success or failure after an event has been consumed. Examples include: "$ Operating profit per room", "$ Earnings before interest and taxes (EBIT)" or "$ Cost avoidance savings".

Input – Reflects assets and resources invested in or used to generate business results. Examples include: "# Headcount", "$ Cost per broadcast hour" and "# Knowledge materials distributed to employees".

Process – Refers to the efficiency or productivity of a business process. Examples include: "% On time delivery", "# Conflicts arisen during the project", "# Average call handling time" and "# Mean time to repair".

Output – Measures the financial and nonfinancial deliverables or results of business activities. Examples include: "% Passenger seats sold", "# New customers acquired" or "$ Revenue per successful call".

Outcome – Reflects overall results or impact of the business activity in terms of generated benefits, as a quantification of performance. Examples include: "% Customer retention", "% Employee turnover", "$ Net income after taxes (NIAT)" or "% Brand awareness".

Qualitative – A descriptive characteristic, an opinion, a property or a trait. The most common ones gauge customer or employee satisfaction through subjective assessments. Based on a subjective interpretations of a customer's or employee's opinions. Oftentimes these type of indicators are not expressed numerically, but as narrative text. Sometimes a rating is allocated do rank between levels (i.e. Likert scale).

Quantitative – A measurable characteristic, resulted by counting, adding or averaging numbers. Quantitative data is most common in measurement and therefore forms the backbone of most KPIs. Operational systems that manage inventory, supply chain, purchasing, orders, accounting, financial systems, all gather quantitative data by means of KPIs. Other examples of quantitative KPIs are "# Employee tenure", "# Units per man-hour" or "# Maintenance backlog".

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Appendix B: Related Products

This report is part of a collection of smartKPIs.com products and services dedicated to Human Resources as a functional area:

Top 25 HR KPIs of 2010 report

HR Scorecard Pre-populated Excel Template

HR Dashboard Pre-populated Excel Template

HR Performance Management System Toolkit

KPIs, Dashboard & Scorecard for HR Training Course

Managing and Improving Individual Performance Training Course

More details are available at: **www.smartKPIs.com/Premium**

Appendix C: About eab group

Profile

Established in 2004, **eab group** is an innovative research driven provider of integrated performance management solutions, assisting organizations to achieve results by architecting performance.

Our expertise in strategy, organizational performance management, business intelligence and project management helps clients in sustainably delivering value for their stakeholders.

Our services include consulting, training, research and technology integration.

Team

- A core team complemented by a network of consultants and associates with a blend of practical business experience, strong consulting skills and an interest in academic research.
- Committed to using scientific methods and practical experience to deliver tangible and sustainable benefits.
- Highly trained: collectively, our team accumulated 6 Master degrees, 1 MBA and 1 PhD.
- Experienced: tens of Balanced Scorecard based performance management systems implemented, hundreds of scorecards and dashboards developed, thousands of KPIs selected and documented.

Experience

- Tens of Balanced Scorecard based performance management systems implemented.
- Successful deployments of operational performance management solutions: supplier scorecards, portfolio dashboards, project performance evaluations and benefits realisation management.
- Thousands of KPIs selected and documented.
- Portfolio, program project management and PMO operations.
- Performance management software selection, Excel Dashboards / Scorecard design.
- Development of knowledge portals.

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Appendix D: eab group Services

Pre-packaged solutions

1. Performance Management Pre-populated Templates

Developed in Microsoft Excel and Powerpoint, following optimal data visualisation and streamlined file administration principles.

- Operational KPI dashboards (preselected KPIs documented and grouped by theme)
- Balanced Scorecard based Organizational Performance Management Systems (Performance Architecture, Desired State of Evolution, Strategy Map, Performance Scorecard, Initiative Portfolio and Administration Process Map).

2. *smartKPIs Premium*

smartKPIs Premium is the premium section of the database, consisting of over 1,400 KPI examples preselected by the eab group's research team as the most relevant for practice. Thoroughly documented in over 30 fields, they make ***smartKPIs Premium*** the most comprehensive and well documented selection of Key Performance Indicator (KPI) examples in the world, the '*gold standard*' in KPI documentation.

3. Assessment / Audit / Review

Audit of organizational performance management systems at strategic, operational or individual levels.
Organizational capability assessment using eab group's proprietary tools:

- Performance Management Maturity Model
- Performance Measurement Maturity Model

4. Training

Core courses (1-2 days)

1. Integrated Performance Management: Linking Strategic, Operational and Individual performance;
2. Measuring and learning with Key Performance Indicators;
3. Implementing and using a Balanced Scorecard based performance management system;
4. Supplier Performance Management – Maximizing the value added by suppliers;
5. Solutions for improving the operational performance of Small and Medium Enterprises (SMEs).

KPIs, Dashboard and Scorecard for functional areas (1 day) – i.e. HR, IT, Marketing, Sales, Purchasing / Logistics.
KPIs, Dashboards and Scorecard for industries (1 day) - i.e. Medical Centres, Hotels, Real Estate Agencies.

Customized solutions

5. Organizational Performance Management Systems Implementations

- Integrated performance management systems based on the Balanced Scorecard.
- Application at all organizational levels, or limited to strategic level, operational level or individual level.

6. Key Performance Indicators Advice

- Overhaul of existing KPIs, by reviewing and updating them in accordance to organizational strategy and best practice.
- Assistance with KPI selection.
- KPI documentation support – customisation of smartKPIs Premium templates to reflect organizational needs.
- Development of customised KPI catalogues.
- Assistance in identifying reliable benchmarking resources.

7. Operational performance management solutions

Supplier performance management – Development and implementation of supplier scorecards for both products and services suppliers

Portfolio performance management

- Development of Portfolio Dashboards and Project Scorecards
- Identification of Key Risk Indicators and establishment of Risk Scorecards

Benefits realization management

- Development of benefits management plans
- Project or program evaluation

Alliances performance

- Establishment of Alliances Scorecards
- Development of Service Level Agreements

8. Strategic and operational planning

- Facilitation of strategic planning sessions.
- Strategic research: environmental scans, strategic planning tools deployment (Five forces, SWOT analysis, competitor review).

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Appendix E: eab group Online Portfolio

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At the core of **smartKPIs.com** is an online catalogue of over 6,400 KPI examples from 14 business functional areas and 24 industries. **smartKPIs Premium** is the premium section of the database, consisting of over 1,400 KPI examples preselected by the eab group's research team as the most relevant for practice. Thoroughly documented in over 30 fields, they make smartKPIs Premium the most comprehensive and well documented selection of Key Performance Indicator (KPI) examples in the world, the 'gold standard' in KPI documentation.
The community of members also benefits from interactive features such as Questions & Answers, comments and a set of performance measurement resources, among which over 1,000 examples of performance management reports.

purposefulIdentity
Values . Mission . Value drivers . Vision vmvdv.com

PurposefulIdentity.com contains a free online catalogue illustrating the use of corporate identity elements in practice by organizations from around the world. Registered users can explore, bookmark and comment on hundreds of referenced online resources that contain organizational values, mission statements, value drivers and vision statements used in actual business context.

integratingPerformance
All about Performance Management eabIP.com

IntegratingPerformance.com is an online platform for integrating performance management knowledge, at strategic, operational and individual levels. It reviews the evolution of Performance Management as well as the key tools, systems and software used at discipline at each of these levels. It combines the analysis of theory and architecture with insights regarding good practice and key directions, enabling visitors to gain comprehensive insights into the nature of Performance Management as an integrating discipline.

BalancedScorecardReview
Reviewing the BSC (r)evolution BSC20.com

BalancedScorecardReview.com is the most comprehensive online resource dedicated to the Balanced Scorecard. It contains a review of this popular management concept following its evolution and use around the world in various industries or companies. It presents its various interpretations, compares it to other concepts and explores its impact on organizations as well as the opinions of critics.

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Reviewing the BSC (r)evolution

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