Employee Relations Benchmark Study
2016

Overview

The inaugural HR Acuity® Employee Relations Benchmark Study is a groundbreaking study established to identify and define "best practices" in relation to employee relations management in the US. Organizations with more than 1,000 employees across a wide array of industries were asked to provide data on employee relations practices related to their organization model, case management processes, employee issue types, volumes, trends and internal data-driven metrics. In the end, we had 74 organizations participate representing over 870,000 US employees!

The goal of the Benchmark Study was to establish a foundation for the development of a unique set of best practice employee relations benchmarks for organizations. To this end, the Study provides a broad view of the respondent data by presenting the overall data as well as additional insights based upon three cross-sectional data slices:

- Industry
- Employee relations organization model, and
- Number of employees

The vast majority of respondents were senior employee relations or human resources leaders, well positioned to share meaningful insights into their organization's best practices.

On behalf of the HR Acuity® team, I would like to thank the Employee Relations Benchmark Advisory Board for providing their time and insightful expertise toward study and question development. Advisory Board members included employee relations leaders from the following organizations: Adventist Health System, Brown University, Citizens Bank, John Hancock/Manulife, LinkedIn, Medtronic, MetLife, TIAA, and Walgreens.

We had high expectations for the Employee Relations Benchmark Study, and we are delighted at both the participation and the depth of insight that it provides. The HR Acuity® team is already looking ahead to next year's Study and watching the many trends highlighted across the employee relations landscape evolve.

To learn more about the HR Acuity Employee Relations Benchmark Study or to request to participate next year, please contact us as benchmark@hracuity.com or call 888-598-0161.

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Study Terminology

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The following terms will be used throughout the Study:

Employee Relations Professional: those individuals who are dedicated to managing or working on employee relations matters.

HR Business Partners or Generalists: those individuals who provide strategic or operational human resources support to business or functional areas.

Employee Relations Organizational Model:

Centralized: A Centralized team of Employee Relations Professionals or Center of Expertise ("COE") responsible for managing employee relations issues and conducting investigations across the organization. (Note this group does not have to be geographically centralized)

Mixed: A Centralized team for managing some or most of the employee relations cases and investigations but field resources (HR Generalists, Business Partners and/or managers) still manage some employee relations issues.

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

The following acronyms will be used throughout the Study:

"ER"   employee relations
"ERP"   employee relations professional
"HR"   human resources
"HRG/BP" human resource generalist/business partner
"FTE"   full-time equivalents
"COE"   Center of Expertise
"ERM"   Employee Relations Management System
"HRIS"   Human Resource Information System

Key Findings

Key Findings

The HR Acuity Employee Relations Benchmark Study is proud to have produced the first of its kind benchmarking for staffing ratios, case management responsibilities and issue volumes. Metrics within this Study will provide comparisons to similarly situation organizations.

Organizations are moving toward Centralized or Mixed Models for managing employee relations. 60% of organizations reported using a Centralized "Center of Expertise" with another 27% utilizing a hybrid Mixed Model with some centralization supported by field human resource generalists.

Respondents noted significant pros and cons to an organization's choice of a Centralized or Decentralized ER Model. Centralized Model got high marks for consistency, neutrality and expertise but struggled with workload and visibility to business issues. Decentralized scored well for speed of response and alignment with the business but lacked standardization and stretched resources thin. The Mixed Model described by one respondent as "a centralized strategy with on the ground effectuation and handling of local nuances" also has challenges due to role confusion and lack of coordination.

Organizations with Centralized ER Models use 25% fewer HR resources than those with Mixed and Decentralized Models. While variations exist based upon organizational model and number of employees, on average organizations have .67 employee relations professional and 2.22 human resource generalist/ business partner per 1,000 employees. Of the 68% of organizations that have in-house labor and employment resources to support the HR function, they staff at about .17 per 1,000 employees.

Regardless of organizational model, the large majority of ER professionals and HR Generalists/ Business Partners report into Corporate HR. The only noted variation was within a Mixed Model where the largest percentage (26%) reported into the line of business.

Centralized ER teams or Centers of Expertise are juggling an incredible array of responsibilities in addition to case management. In addition to the 8 broad categories utilized in the Study, respondents listed another 30 areas of responsibility that ran the gamut of organizational design, outplacement services, and drug testing to reductions in force (RIF) management and unemployment insurance hearings.

Case complexity and load work are increasing across the board. Regardless of organizational model, HR Professionals are feeling the burden of both high caseloads and a broad spectrum of general employee relations responsibilities. Forty percent of respondents were managing 11 to 25 and another 31% were managing 6 to 10 at any time. Respondents reported experiencing increased levels of case complexity almost across the board.

Key Findings

For every 1,000 employees, organizations will receive approximately 4.44 allegations of discrimination or harassment. This is in addition to approximately 1.26 EEOC or other administrative charges made against an employer.

Performance-related and behavioral issues consume time at a rate of just under 200 cases per 1,000 employees.

Requests for accommodations are continuing to rise. Respondents report managing the interactive process for approximately 35 accommodation requests annually for every 1,000 employees.

A significant decrease in case load was identified for HR Generalist/Business Partners and Managers (non-HR) within a Centralized Model. By contrast within the Decentralized Model, the HRG/BPs and non-HR managers have their hands in all types and tiers of employee relations situations.

Risky trends for storing sensitive employee relations documentation is evident in more than 50% of organizations. Almost 60% of documentation related to employee relations matters is stored in either locally by the HR professional or in some mix of personal files, emails, case management systems and shared drives. In Decentralized environments these numbers were even more troubling as HR Professionals were twice as likely to maintain their own files.

Enterprise organizations are twice as likely to require specific forms or templates when conducting workplace investigations. While just under a quarter of respondents reported their organization requiring specific forms or templates when conducting a workplace investigation, organizations with 20,000+ employees required them 53% of the time. Conversely small organizations (less than 3,500 employees) provided no guidelines at all 48% of the time.

Organizations are steadily increasing their reliance on the real-time metrics and trending data available from employee relations management system to help mitigate employee-related risk, surface employee relations vulnerabilities, and deliver fair investigation outcomes. When we started surveying organizations in 2009, less than 15% used an employee relations management system and over 50% didn't track at all. The tide has been turning over the past seven years and this year it almost totally flipped. Over 45% of organizations now use some form of an employee relations management solution or case management system while only 12% reported not tracking at all.

Most respondents described employee relations analytics as "early stage." However those that are ahead of the curve actively monitor key metrics and provided insightful examples of how the information measured has been used to impact key business drivers.
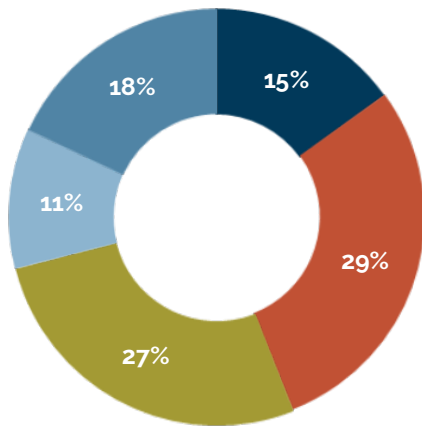
Respondent Profile

Respondent Profile

Senior ER and HR practitioners representing 74 organizations with over 870.000 US employees responded to the Benchmark Study call for information.

Annual Revenue

15%
29%
27%
11%
18%

- ■ < $100 million
- ■ $100 million to $999 million
- ■ $1B - $5B
- ■ $6B - $10B
- ■ >$10B

Global or US-Based

44%
13%
43%
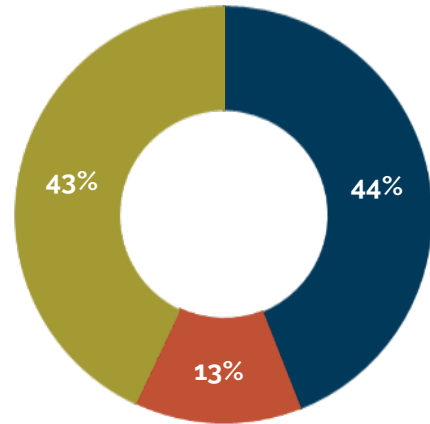
- ■ Global
- ■ Primarily US-based, but some regional presences
- ■ US-based only

Organization Type

56%
26%
4%
14%
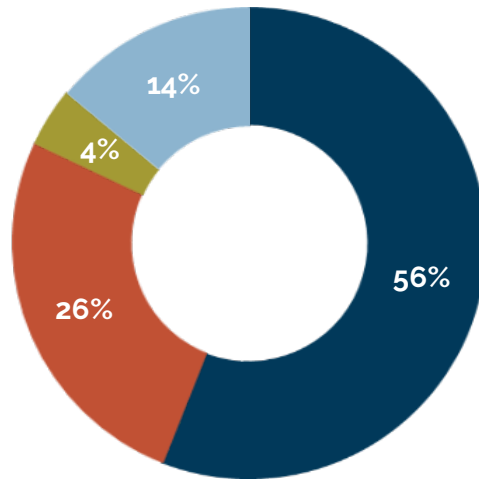
- ■ Public
- ■ Private
- ■ Government
- ■ Nonprofit

Individual respondents to the 2016 HR Acuity Employee Relations Benchmark Study were senior leaders in HR and employee relations, ER business partners, managers of performance and learning, and compliance directors reporting on behalf of organizations with over 1,000 employees. Participation across differing industry sectors was broad.

Respondent Profile

HR Acuity® reviewed the data across industry sectors, employee relations organizational model, and number of US employees.

Industry Sectors
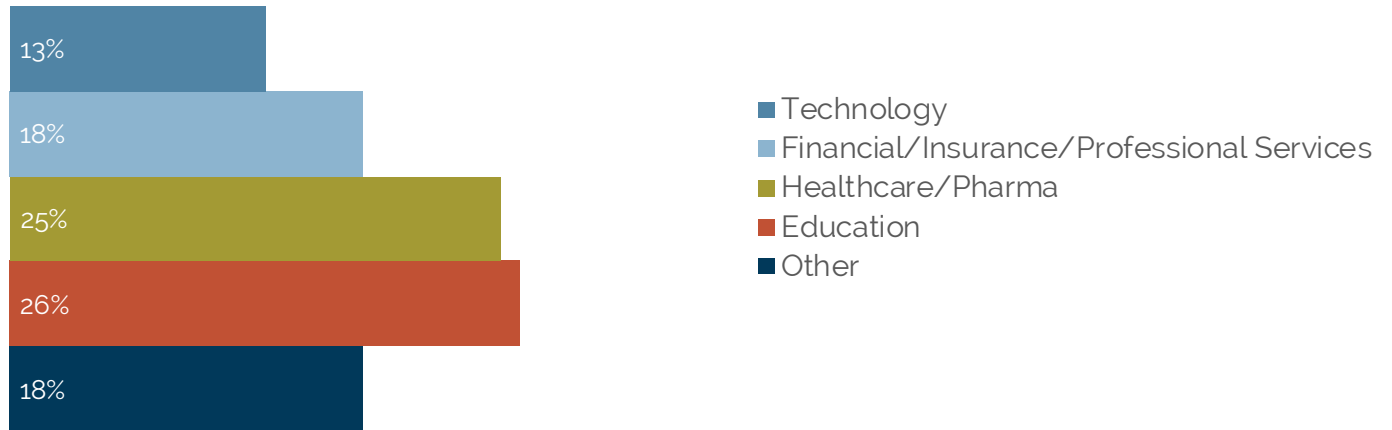
- 13%
- 18%
- 25%
- 26%
- 18%

■ Technology
■ Financial/Insurance/Professional Services
■ Healthcare/Pharma
■ Education
■ Other

Employee Relations Organization Model

- 13%
- 27%
- 60%

■ Decentralized

■ Mixed

■ Centralized

Number of US Employees

- 30%
- 30%
- 20%
- 20%

■ <3,500

■ 3,500 - 9,999

■ 10,000 - 19,999

■ 20,000+

Organizational Model

Organizational Model

Organizations are moving toward Centralized or Mixed Models for managing employee relations.

Employee Relations Organization Model

- **Centralized:** There is a centralized team of Employee Relations Professionals or Center of Expertise ("COE") responsible for managing employee relations issues and conducting investigations across the organization.
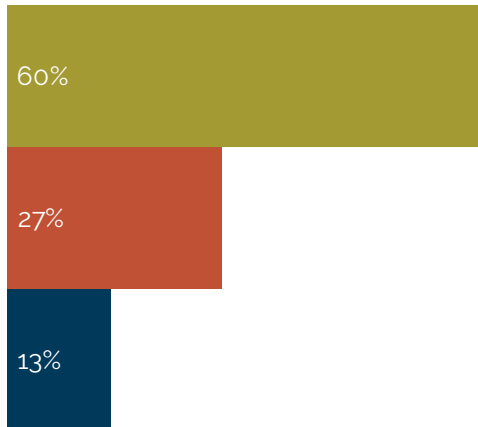
- **Mixed:** There is a centralized group for managing some or most of the employee relations cases and investigations but field resources (e.g, HR Generalists, Business Partners and/or managers) still manage some employee relations issues.

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

The majority of respondents in the Study identified as having a Centralized Employee Relations Organizational Model. The choice of organization model was relatively consistent regardless of organization size or industry. No enterprise sized organization reported a Decentralized Model and were more heavily weighted in the Mixed Model than other sized organizations. Given the complexity of business units for this sized organization, the data makes sense. Similarly, smaller organizations maintain Centralized organizations presumably due to limited resources. While still more than 50% Centralized, both healthcare and financial/insurance were more likely to have a Decentralized or Mixed Model than the other industries.

Which statement best describes your current employee relations Model in the US?				
	BY NUMBER OF US EMPLOYEES			
	<3,500	3,500 – 9,999	10,000 – 19,999	20,000+
CENTRALIZED:	67%	62%	71%	43%
MIXED	19%	14%	29%	57%
DECENTRALIZED	14%	24%	0%	0%

Which statement best describes your current employee relations Model in the US?				
	BY INDUSTRY			
	Healthcare/ Pharma	Technology	Education	Financial/Insurance/ Professional Services
CENTRALIZED	50%	67%	72%	54%
MIXED	33%	22%	28%	23%
DECENTRALIZED	17%	11%	0%	23%

Benefits and Challenges of Employee Relations Organizational Models

We asked for feedback from the participants on the benefits and challenges related to their employee relations structure. Those two questions were the most answered open ended questions in the Study. And as you would imagine, themes quickly emerged.

Below we share some of those comments that best reflect the voices heard from our participants.

Centralized Model

For overall employee relations management, a Centralized Model was identified by respondents as fostering a consistency of approach, process and policy interpretation. Participants value the sense of "team" in a Centralized approach which enabled opportunities for collaboration. The most significant challenge to a Centralized Model is the inability to "ramp up or ramp down" resources to accommodate unpredictable, fluctuating case volumes. Additional insights about this model are addressed later in this report.

Benefits

CONSISTENCY

"Allows for consistency of investigative techniques across all US businesses."

"Consistency of approach reduces liability."

"Increases consistency in recommendations in like cases."

"Greater consistency in policy interpretation and application of disciplinary action."

"Known precedence to recommend consistent discipline following the same guidelines."

"Control of duplicity and messaging."

NEUTRALITY

"Objective investigations not aligned to businesses."

"Provides an appearance of neutrality when an ER Professional steps in."

"A neutral third party allows for a different set of impartial eyes to look at a situation."

"No emotionally based decisions."

"Ensures no bias in investigations and outcomes."

COLLABORATION

"Ability to brainstorm approaches quickly with a small team."

"Fosters team collaboration."

"Free flow of information between HR Generalists and ER Professionals helps build a level of trust between ER and HR."

"Better collaboration with COEs by leveraging metrics to influence development and enhancement of training."

PRODUCTIVITY/EFFICIENCIES

"Speed of decisions."

"Frees up HR Business Partners: Creates capability for HRBPs."

"Ability to balance workload."

"Case load balanced by case type."

EXPERTISE

"Great technical skills, subject matter expertise."

"Ability to leverage expertise."

"Allows for a focus on development of critical thinking and conflict resolution skills."

Organizational Model

Challenges

WORKLOAD

"Employee Relations Professionals are stretched in terms of case numbers and administrative work."

"Workload is sometimes difficult to balance among the ER team due to business activity level."

"ER issues can consume considerable time and resources with no staff backup."

"Reactive crisis issues come up that limit the team's ability to work on the positive part of the job."

VISIBILITY TO BUSINESS ISSUES

"Lack of visibility and speed to issues."

"SMEs are housed in a central location which minimized their presence in the field."

"Potential for ER to feel out of the loop on certain business updates."

"Not in the field as much as needed."

"Understanding the culture at different locations."

CAREER OPPORTUNITIES

"Lack of career options."

"Potential for burnout...ER can be taxing."

Mixed Model

About a quarter of organizations reported having a Mixed Model for managing employee relations issues. Perhaps the best of both world, this model got similarly high marks as the Centralized Model for consistency and expertise while allowing for greater touch with the businesses. Perhaps best said, one respondent described this model as having a "Centralized strategy with on the ground effectuation and handling of local nuances." The Mixed Model is not, however, without its challenges including role confusion and discoordination of resources.

Benefits

CONSISTENCY

"Consistency of practice, standardization of processes."

"All departments are on the same page."

"Consistency related to best practices and discipline."

"Consistent treatment of matters."

EXPERTISE

"Allows for deep level of expertise."

"Serves as a source of specialized knowledge."

"Provides opportunity for consultation and escalation."

RESOURCE ALLOCATION

"Removes some of the employee relations burden from HR generalists."

"There are more people available to handle certain situations."

"Flexibility that encourages HRBP to stay connected to their client groups so they can address less-complex situations directly."

Organizational Model

Challenges

"HRBPs not always willing to let work go."

"Managers are confused on who to call for what."

"Too many people involved in the decision making. Greatly slows down our process."

"Role responsibility and clarification."

"Case information collected and retained by different parties."

"Communication and coordination."

Decentralized Model

Only 13% of participating organizations defined themselves to use a decentralized environment. At HR Acuity we have seen this shift dramatically since we first started our Employee Relations and Investigation Survey six years ago, a precursor to this more in-depth study. In as late as 2011, organizations reported approximately 38.5% in a Decentralized Model. While no longer as popular, this model does still have clear benefits according to the comments received. The two repeated benefits that came through in the Study responses related to speed of response and alignment with the businesses. Challenges centered on lack of consistency.

Benefits

"Quicker response time by having multiple people responsible."

"Quick response, shared workload."

"Ability to develop strong relationships and embed ourselves into the organization."

"Close relationships with business leaders and employees."

"Ability to service the organization in a timely manner."

Challenges

"Lack of consistency. No standardized process. Lack of reporting capabilities including trend analysis."

"No controls over consistency of application of best practices."

"Diversity of skill sets."

"Lack of standardization."

"Limited bandwidth to truly support strategic needs of business."

"HR stretched thin."

Transition to a Centralized Model

The survey also reviewed any plans by organizations to change their model (move from Decentralized to Centralized). While the majority (61%) said there were no plans under consideration, certain pockets of participants showed trending data.

Within the industry review, 33% of healthcare organizations reported plans to move to a Centralized Model within the next 12 months versus the overall 14% average for that category. 100% of the technology firms currently in a Decentralized or Mixed Model reported considering a change in the future (versus 25% overall). When looking at size of organization, 57% of the smaller organizations (3,500 or less) reported considering a change and 63% of the largest organizations in our survey (20,000+) reported considering or being ready to make a change this year.
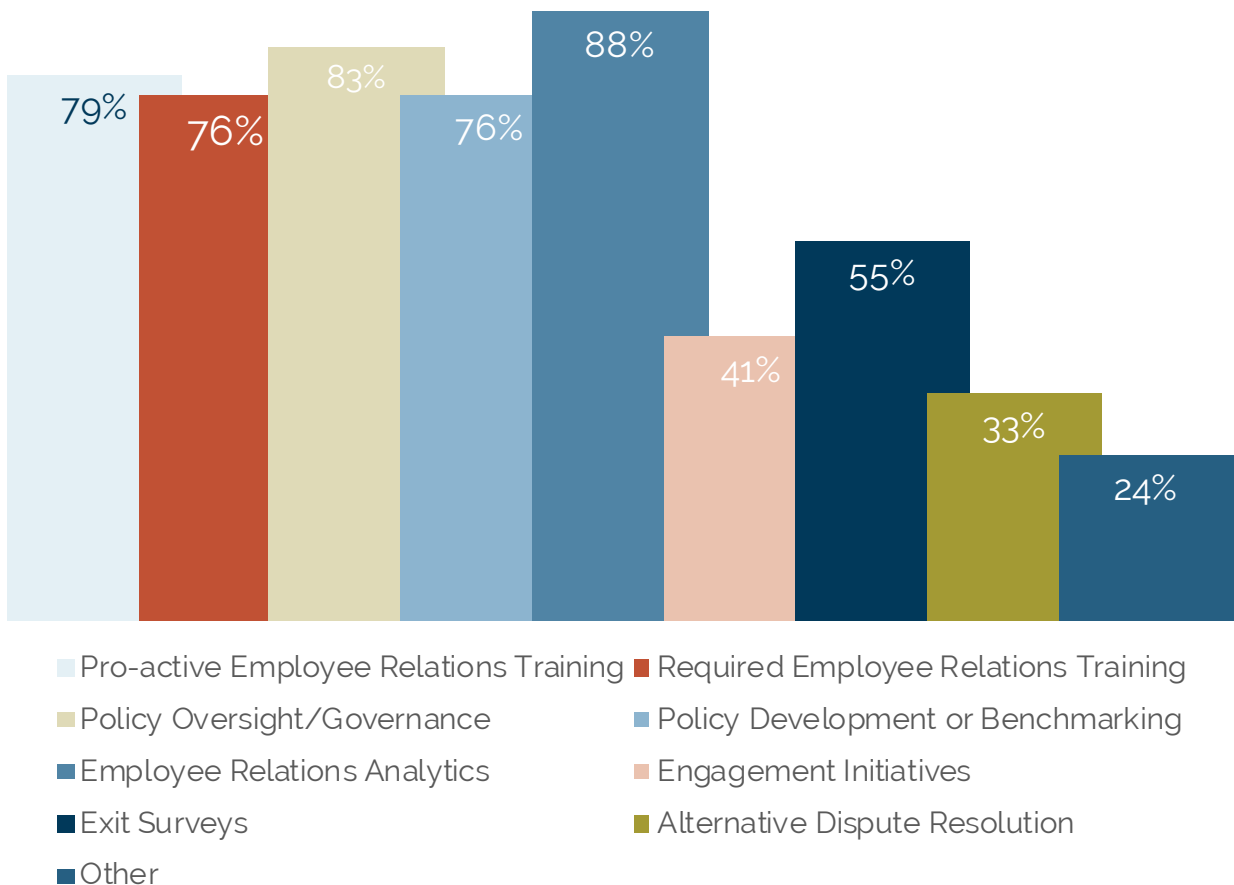
Centralized Centers of Expertise

Centralized Centers of Expertise

In order to get a better understanding and benchmark how the Centralized Employee Relations Centers of Expertise (COE) function, we asked some additional questions:

Functional Responsibilities

Within the Centralized Model, Respondents reported additional responsibilities that were managed by their team to include:

Additional Functions Managed by ER Professionals

- Pro-active Employee Relations Training — 79%
- Required Employee Relations Training — 76%
- Policy Oversight/Governance — 83%
- Policy Development or Benchmarking — 76%
- Employee Relations Analytics — 88%
- Engagement Initiatives — 41%
- Exit Surveys — 55%
- Alternative Dispute Resolution — 33%
- Other — 24%

In over 75% of the organizations who reported a Centralized Model, policy development, policy oversight/governance, employee relations training (both required and pro-active) and employee relations analytics were included within the scope of the Center.
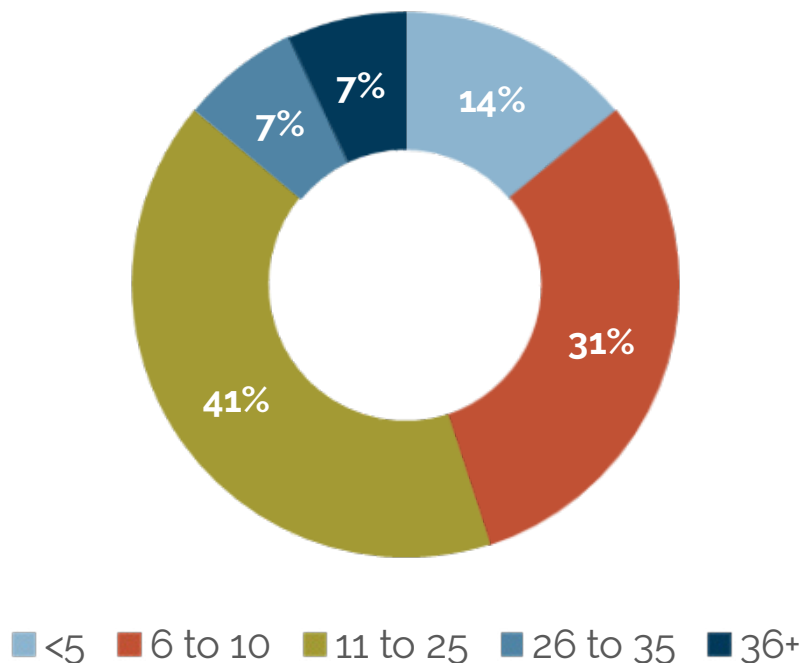
Centralized Centers of Expertise

Case Load

HR professionals are feeling the burden of both high caseloads and a broad spectrum of general employee relations responsibilities.

Caseload is a common question that is raised...how many cases should an Employee Relations Professional have on his/her plate? While it is hard to generalize due to the potential scale of complexity, the majority of respondents reported about 11 – 25 at any time. Almost three-quarters of respondents had anywhere from 6 to 25 cases assigned to an ER practitioner at a time.
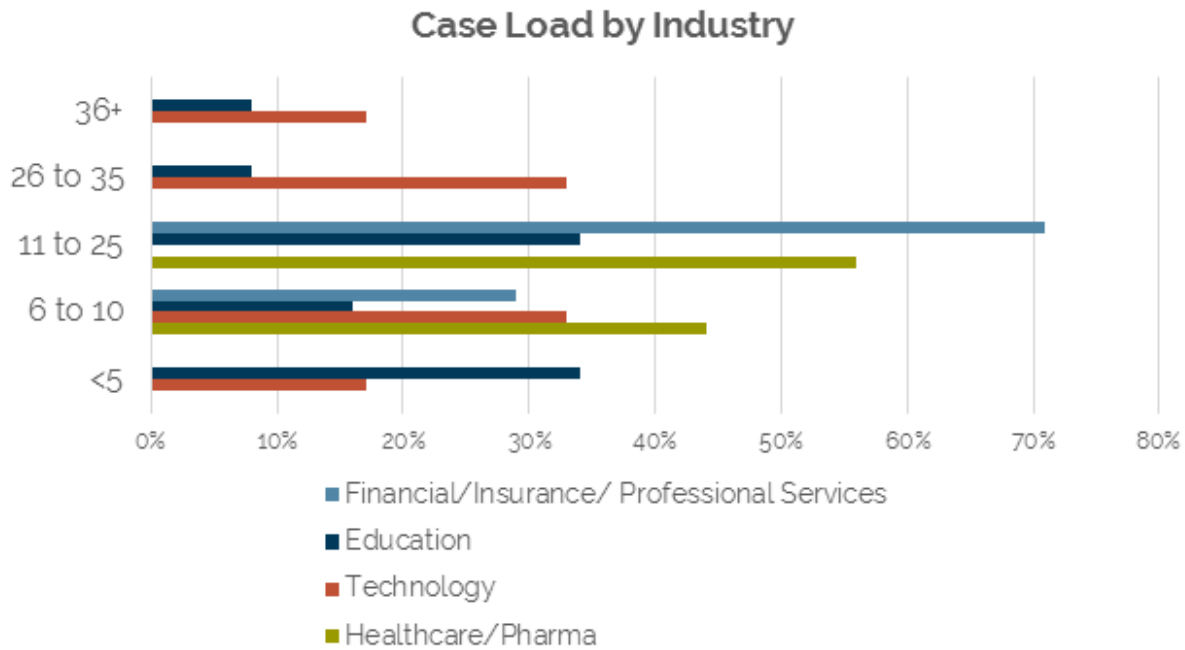
Average Number of Cases Per ER Professional

| ■ <5 | ■ 6 to 10 | ■ 11 to 25 | ■ 26 to 35 | ■ 36+ |

"We have seen an increase in frequency and complexity of escalated case work."

Centralized Centers of Expertise

Reviewing by industry, we found a wider variation. Education tended to be on the lower end (34% with fewer than five cases) while technology tended to be on the high end with 50% having 26+ cases.

Case Load by Industry

Legend:
- Financial/Insurance/ Professional Services
- Education
- Technology
- Healthcare/Pharma

There was little significant variation when analyzing by size of organizations although organizations with greater than 10,000 – 20,000 tended to fill the plates of their ER team a bit more than other smaller sized organizations with 80% having 11+ cases and 20 to 30% over 25.
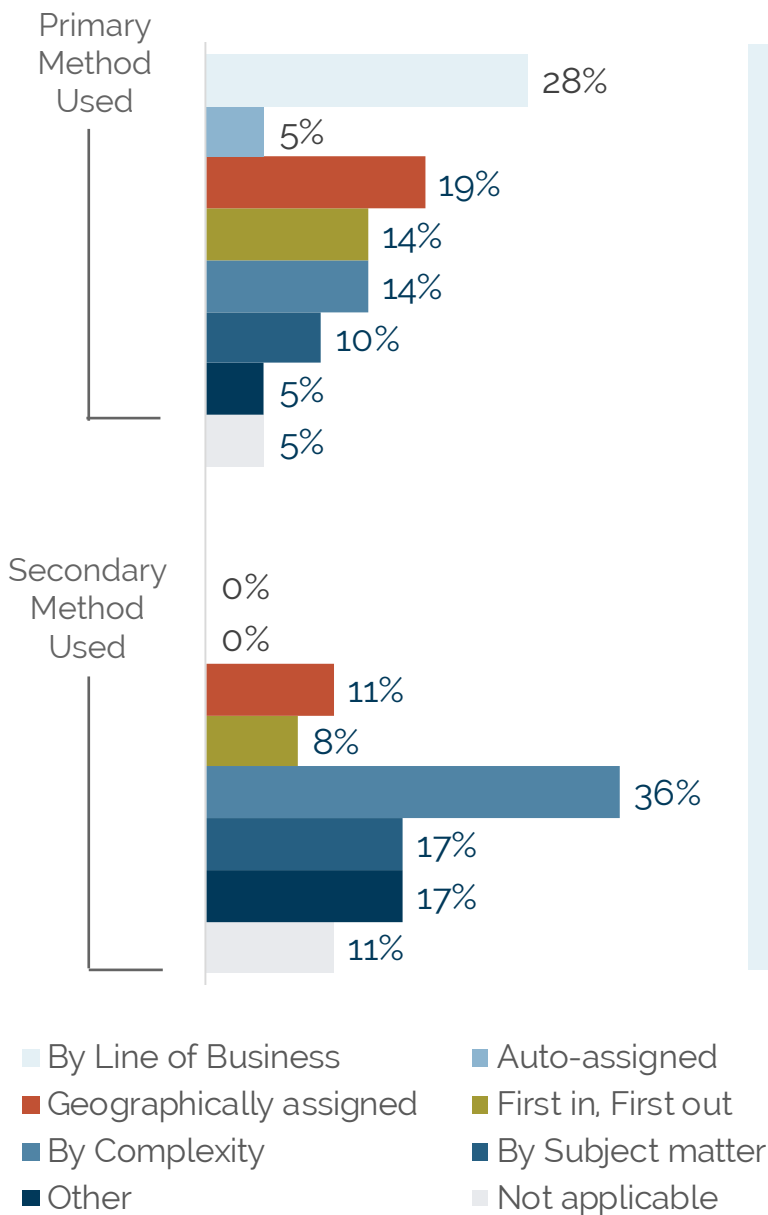
Case Load by Number of Employees

Legend:
- 20,000+
- 10,000 - 19,999
- 3,500 - 9,999
- <3,500
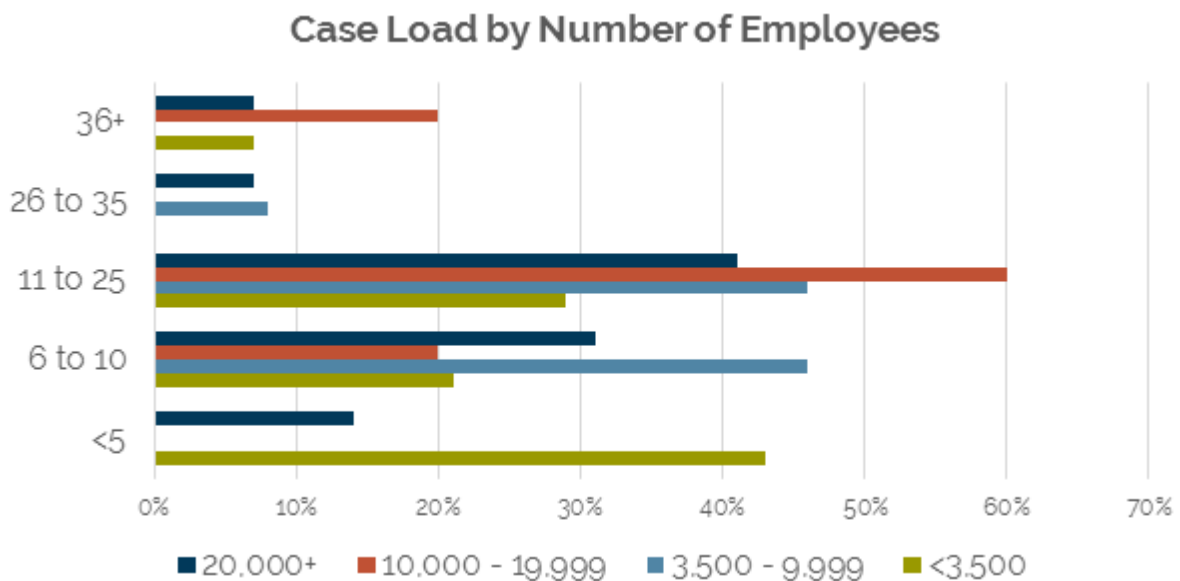
Case Assignments

Although one-third of respondents assigned ER issues by line of business, several other methodologies featured prominently as well.

How Employee Issues are Assigned

Primary Method Used
- 28%
- 5%
- 19%
- 14%
- 14%
- 10%
- 5%
- 5%

Secondary Method Used
- 0%
- 0%
- 11%
- 8%
- 36%
- 17%
- 17%
- 11%

"If the [ER Professional] worked on a case on the same employee, they would work on the next case on that same employee."

"Senior Director assigns all cases based on workload and complexity based on the strengths and weaknesses of team members."

"Based on volume...if an [ER Professional] has a larger case load in their geographic area, it will be assigned to another [ER Professional] with a low case load."

Legend:
- By Line of Business
- Auto-assigned
- Geographically assigned
- First in, First out
- By Complexity
- By Subject matter
- Other
- Not applicable

Service Level Agreements

Two-thirds (64%) of the organizations with a Centralized Model do not use service level agreements (SLAs). Of those that used them, 21% do so "informally." Of those that reported using SLAs, some shared what was being measured:

- Response time: next business day – non critical issues; 2 hours for critical issues (self – reported)

- Response Time: 48 hours

- Case Entry 7 days

- Case close 40 days

- Time to connect with reporter (spot checked)

- Time to close (monthly reports)

- Quality of interaction with the investigator

Resources

Employee Relations Professionals and HR Generalist/Business Partners

One of the most frequently asked questions that comes to HR Acuity is about staffing ratios. Specifically, how many ER Professionals or HR Generalist/Business Partners should be used to staff a particular organization model. We were fortunate that most of the participating organizations shared this information when responding to the Study. To normalize the data, we calculated the number of FTE to each 1,000 employees. We also looked at the information against size of organization as well as organizational model.

STAFFING RATIOS BY NUMBER OF EMPLOYEES	ERP PER 1,000 EMPLOYEES	HRG/HRBP PER 1,000 EMPLOYEES
<3500	1.15	2.83
3,500 - 9,999	0.79	4.01
10,000 - 19,999	0.81	2.21
20,000+	0.55	3.78
All	0.67	2.22

In general the numbers are what might be expected: the larger the sized organization, the more employees each professional supports. The outlier to that is the 4.01 per 1,000 employees for HRG/HRBPs in organizations with 3,500 – 9,999 employees. However, 63% organizations on this size have Decentralized Model which would require more HRG/HRBP resources.

STAFFING RATIOS BY ORGANIZATIONAL MODEL	ERP PER 1,000 EMPLOYEES	HRG/HRBP PER 1,000 EMPLOYEES
Centralized	0.64	1.78
Mixed	0.70	2.68
Decentralized	0.75	2.57
All	0.67	2.22

Upon review of resources by staffing model, those with a Centralized Model utilize less HRG/HRBP resources since presumably much of the employee relations type work has passed to the centralized employee relations team. By contrast, there does not appear to be much of a difference between the Mixed and the Decentralized ratios. This may also be due to the fact that only 13% of respondents reported to have a purely Decentralized Model. A larger pool of data may be required to validate those ratios.

In-house Legal Resources

In the study we also asked participants to share with us if internal "in house" legal resources are available and used to assist with employee relations matters.

Overall 68% of the respondents responded that yes, they had in-house lawyers dedicated to labor and employment matters. Here is how it looked when we sliced that number by organization model and size.

	EMPLOYEE RELATIONS ORGANIZATIONAL MODEL		
	DECENTRALIZED	CENTRALIZED	MIXED
Yes	33%	70%	79%
No	67%	30%	21%

	RANGE OF US EMPLOYEES			
	<3,500	3,500 - 9,999	10,000 - 19,999	20,000+
Yes	33%	71%	86%	100%
No	67%	29%	14%	0%

Not surprisingly, the larger the organization the more likely that in-house lawyers would be available. Interestingly the same seems to hold true with organizational models whereas the Centralized or Mixed organizations tend to have more dedicated attorneys.

Similar to how we analyzed ratios for Employee Relations Professionals and HRG/HRBPs, we looked at staffing ratios for in-house lawyers by ratio per 1,000 employees:

BY NUMBER OF EMPLOYEES	LEGAL COUNSEL PER 1,000 EMPLOYEES
<3,500	0.63
3,500 - 9,999	0.36
10,000 - 19,999	0.21
20,000+	0.12
All	0.17

BY ORGANIZATIONAL MODEL	LEGAL COUNSEL PER 1,000 EMPLOYEES
Centralized	0.22
Mixed	0.12
Decentralized	insufficient data
All	0.17

Staff Reporting by Model

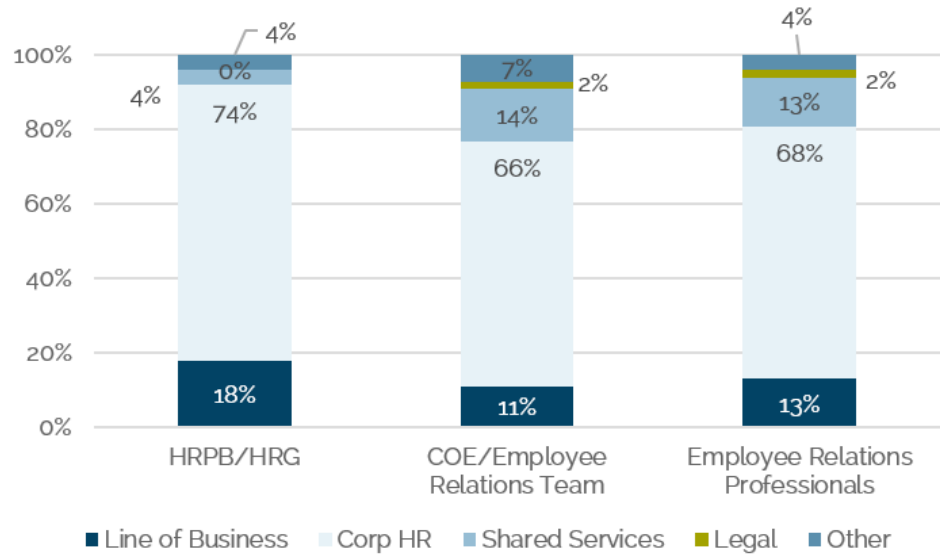### The large majority of ER Professionals and HR Generalists/Business Partners report into Corporate HR.

We asked respondents to share to whom the staff reported. While the following chart shows the overall results, but we also looked to see if there was a differentiation by organizational model. Little differentiation existed with the exception of a spike in HRBP/HRGs reporting to the line business in a Mixed Model. Overall, the majority of Employee Relations Professionals and HR Generalists/Business Partners report into Corporate HR.

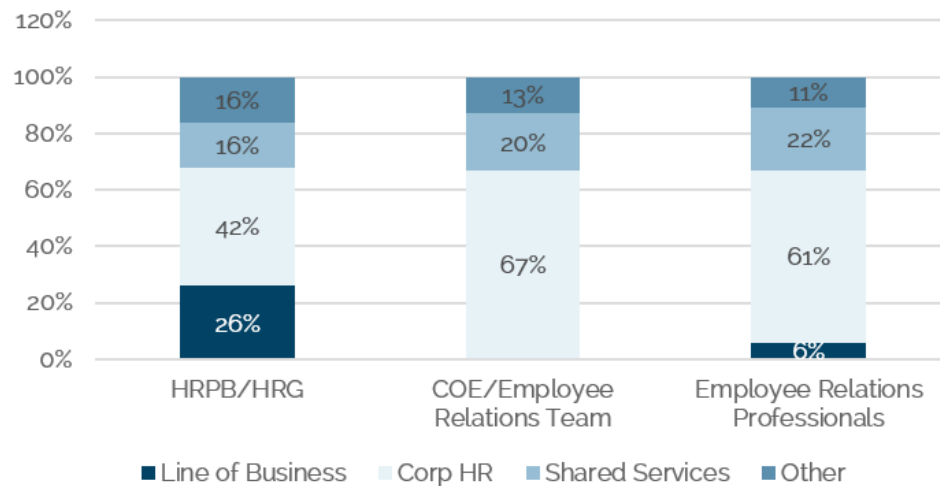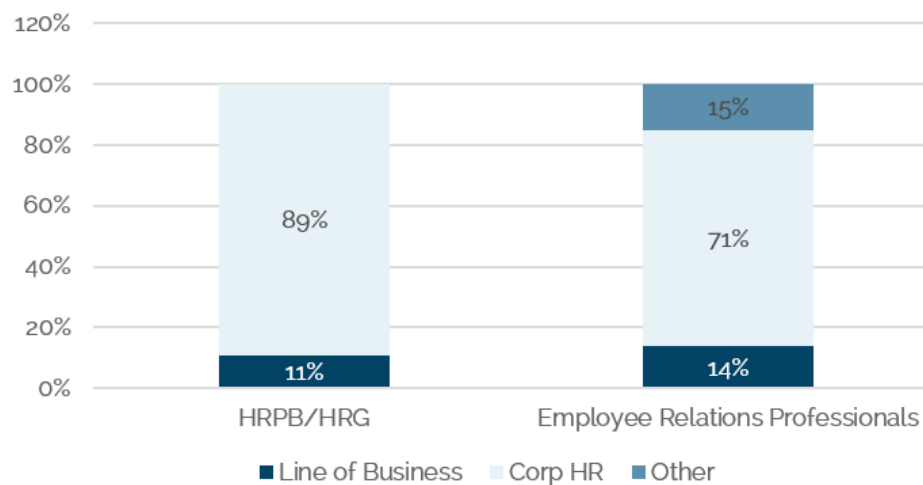**In the US, to whom do these roles or functions directly report?**
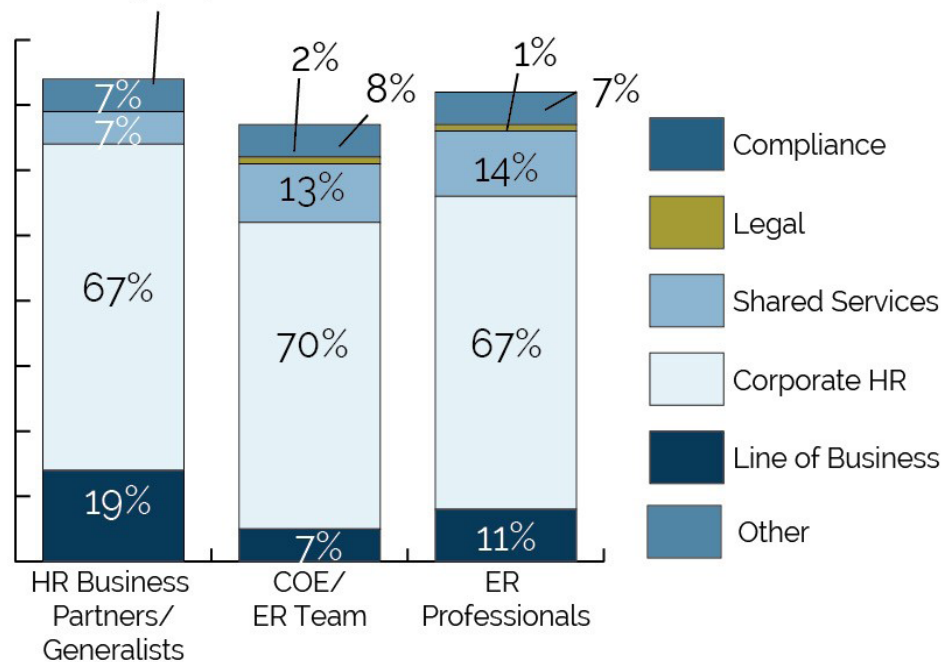
Centralized Model

	HRPB/HRG	COE/Employee Relations Team	Employee Relations Professionals
Other	4%	4%	4%
Legal	0%	7%	2%
Shared Services	4%	2%	2%
Corp HR	74%	14%	13%
		66%	68%
Line of Business	18%	11%	13%

Legend: ■ Line of Business ■ Corp HR ■ Shared Services ■ Legal ■ Other

Mixed Model

	HRPB/HRG	COE/Employee Relations Team	Employee Relations Professionals
Other	16%	13%	11%
Shared Services	16%	20%	22%
Corp HR	42%	67%	61%
Line of Business	26%		6%

Legend: ■ Line of Business ■ Corp HR ■ Shared Services ■ Other

Decentralized Model

	HRPB/HRG	Employee Relations Professionals
Other		15%
Corp HR	89%	71%
Line of Business	11%	14%

Legend: ■ Line of Business ■ Corp HR ■ Other

Case Management

Case Management

Risky trends for storing sensitive employee relations documentation is evident in more than 50% of organizations.

This part of the Study collected data on how cases were managed by organizations. First we reviewed process consistency and document retention methods. We then reviewed mechanisms used for tracking and analytics.
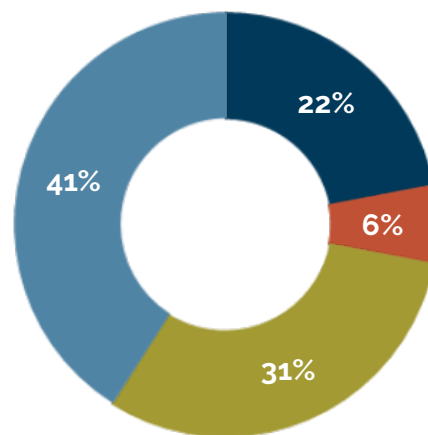
Process and Document Retention

Method for Conducting Workplace Investigations
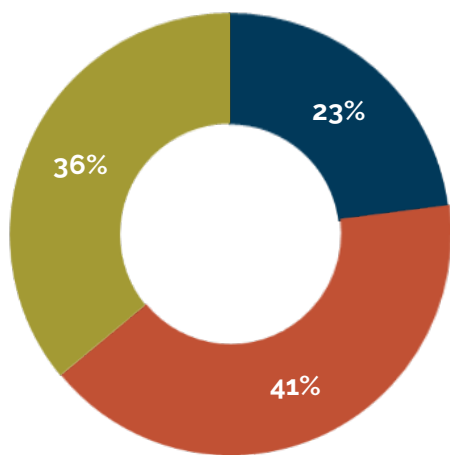
- Required Forms and templates
- Suggested forms and templates
- No specific guidelines

Storing Employee Relations Documentation

- HRBP or ER Professional maintains own documentation
- Documentation is maintained on a shared drive
- Documentation is maintained in an Employee Relations/HR Case Management system
- Mixed. Some combination of case management system, shared drive or personal storage

For ER practitioners conducting workplace investigations, three-quarters of respondents said their organizations either had no required forms or templates or only suggested ones. When looking by for variation by organization size, significant differences were as one might expect. Large organizations (20,000+) required certain templates and forms 54% of the time versus the overall of 23%. Conversely, smaller organizations tended to provide less or no guidelines at 48%. Comparing organizational models, it was interesting that those with Centralized and Decentralized Models were less likely to require forms and templates than those in a Mixed Model.

With regard to maintenance of documentation, similar patterns were highlighted. The most frequent way that documentation is stored is in some mixture of personal files, case management or shared files. This was relatively consistent regardless of how the data was sliced. However, large (10,000 – 19,999 employees) and enterprise organizations (20,000+ employees) were most likely to use a Employee Relations Management System (57 and 46% respectively) to maintain documentation. Decentralized teams maintained their own documentation 44% of the time, double the overall reported score of 22%.

Case Management

Technology and Case Tracking

Employee Relations Management Solutions are being used by the majority of organizations for managing and tracking employee issues.

Tracking Employee Relations Issues

- 27%
- 7%
- 47%
- 5%
- 14%
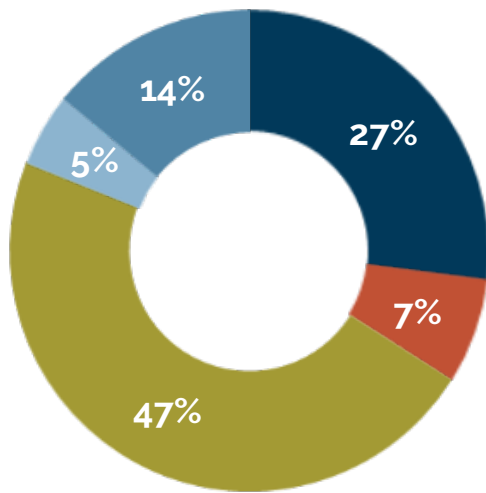
■ Excel spreadsheets or similar
■ Access or other database
■ Employee Relations/HR Case Management System
■ HRIS
■ Don't track

### Plans to Transition to an Employee Relations Management System

- 51%
- 19%
- 30%

■ No plans for transitioning
■ Yes, in the future (greater than 12 months)
■ Yes, within the next 12 months

Almost 50% of respondents use an Employee Relations Management Solution (ERM) or HR case management system for tracking employee matters. 41% of respondents either did not track workplace investigations or did so using basic Excel spreadsheets or similar software.

> " [ERM] provides robust reporting options, strong personnel file storage capability, and ability to ensure consistent application of discipline for similar violations."

Organizations are steadily increasing their reliance on the real-time metrics and trending data available from employee relations management systems.

Technology used for Tracking Employee Relations Matters

- No Tracking
- Excel/Access or similar
- Employee Relations Management Solution/Case Management
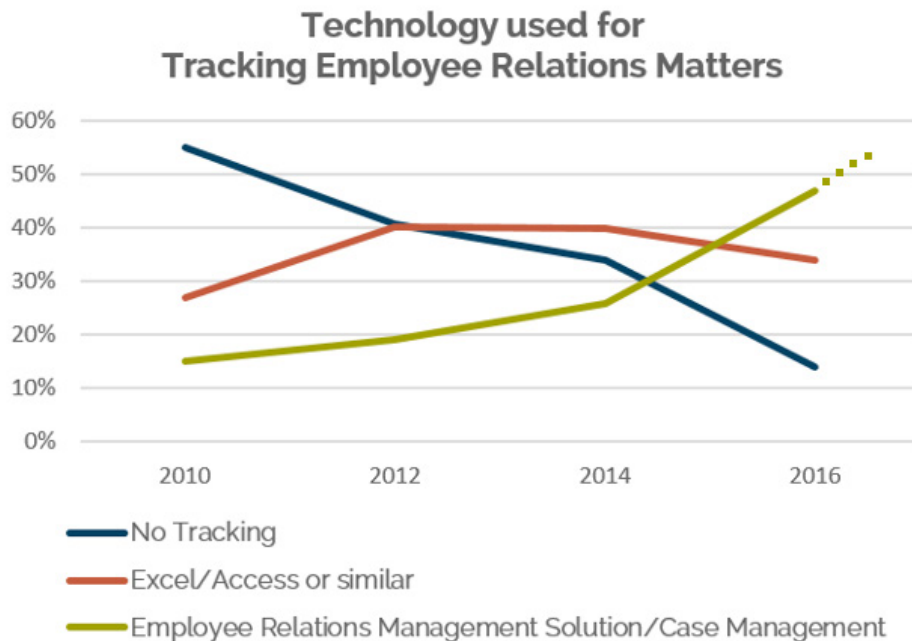
It is interesting to view this trend over time. Since its inception in 2009, the HR Acuity Employee Relations and Investigation Survey asked a similar question about how technology was being leveraged to manage employee relations issues. The chart above shows how the tide has turned in the last 6 years essentially inverting the results. In 2010, the majority of organizations didn't track at all. Now almost the same number report using some type of Employee Relations Management solution or HR case management system.

This trend will continue with almost half of the Study participants (49%) reporting that they plan on transitioning to an ERM or CMS; 30% within the next 12 months and the other 19% over a period greater than 12 months. Respondents that had employee relations management systems reported using data-driven insights to develop more robust ER best practices and surface potential process vulnerabilities.

"In the short time that we have had an automated system, we have noted that the primary areas we have difficulty is with performance management. This knowledge helps us target communication to management and employees."

Below are some of the comments they shared into how they are leveraging technology for employee relations:

"ER trends to inform on training opportunities"

"We use the system in a number of ways. 1) As a case comes in we search for any other cases over the past 5 years related to the complainant and subject 2) To research on similar case and recommendations for remediation for a more consistent approach 3) To pull case numbers for reporting to senior HRAs regarding trends, usage, etc., 4) To retrieve information for charges (i.e. EEOC), 5) ability to view ERA case load."

"The case management system that we utilize has robust reporting capabilities. We utilize these analytical features to isolate trends amongst our field teams. We then use that data to provide necessary training to minimize future issues."

"Our data gives us line of site into employee engagement, leadership of a specific manager/ supervisor or function."

"We utilize the reporting to tell the story."

"Determine where case load is to balance work load and determine training needs based on issues."

"Identify trends in case submissions to determine vulnerability within HR or Management."

"Internal audits conducted by ER to ensure compliance on SLA, quality, documentation, permissions, etc. Regular reports to HRBPs (case log), HRVP (dashboard for their clients), HREVP (enterprise dashboard). Bi-annual legal updates by legal for ER. Collaboration with COEs (talent management, diversity & inclusion, talent acquisition, etc.) on training. I.E. harassment training, performance appraisals, leadership training, onboarding, etc."

"<ERM> helps us not only store and access cases, but it can pull reports on the demographics of those cases."

"Communications with Employee Relations are entered as cases in <ERM>. We are able to report out on volumes, documentation, issues and exit interview results. This allows us to drill down and determine high volumes in specific areas or trends."

Who Manages What

Who Manages What

The Study asked participants to identify who is handling different types of employee relations issues in their organization.

For each issue type presented, respondents indicated involvement based upon Tiers:

Tier 1: The initial intake of employee-related events or issue. Typically will include more routine matters or Q&A that are generally resolved quickly based upon policy or standard operating procedures. Low risk.

Tier 2: is for matters that require escalation due to increased level of complexity or policy interpretation. Typically matters related to low-level officers and below personnel. Medium to high risk

Tier 3: is for the most complex employee-related issues or investigations. May require the additional expertise of a particular in-house group. Typically also matters related to executive/senior office level personnel. Highest risk.

For example, for Performance Management, Managers/Supervisors may do the initial intake or "Tier 1" but once escalated to "Tier 2", the HR Business Partners get involved.

Answers were requested for issues that fell into each of the following categories: Performance Issues, Policy Violations, Work Arrangements/Environment, Terminations and Legal/Regulatory Issues. While all of the data is available in the full Study results, we have provided a graphical representations for Performance Counseling & Documentation, Unprofessional Conduct/Behavior, Policy Violations and Allegations of Harassment/Discrimination and Retaliation based upon both Organizational Model and Role.

The most striking observations involve the roles of the HRG/HRBP and that of the Manager (non HR). In a Centralized Model, the time spent on such matters by the HRG/HRBP is diminished versus a Decentralized or Mixed Model. In a Decentralized Model, the manager is involved in virtually every matter – a responsibility that appears to be somewhat alleviated within the other Models.

The overall data also showed that when the misconduct involved an involuntary termination or an Equal Employment Opportunity Commission (EEOC) claim, organizations heightened the involvement of other areas including compliance, employee relations or upper level management.

Organizations had a variety of professional units in place to help manage issues ranging from leave administration and crisis management to global health, contingent workers and corporate security. Some listed access to subject matter experts as well.

Corporate fraud, security, investigations and threat assessment teams are becoming more commonplace in companies to assist in the management of misconduct related to theft, workplace violence, and code of conduct violations.

The most striking observations involve the roles of the HRG/HRBP and that of the Manager (non HR).

In a Centralized Model, the time spent on such matters by the HRG/HRBP is diminished versus a Decentralized or Mixed Model. In a Decentralized Model, the manager is involved in virtually every matter – a responsibility that appears to be somewhat alleviated within the other Models.

ISSUES MANAGED BY ROLE: Centralized Model
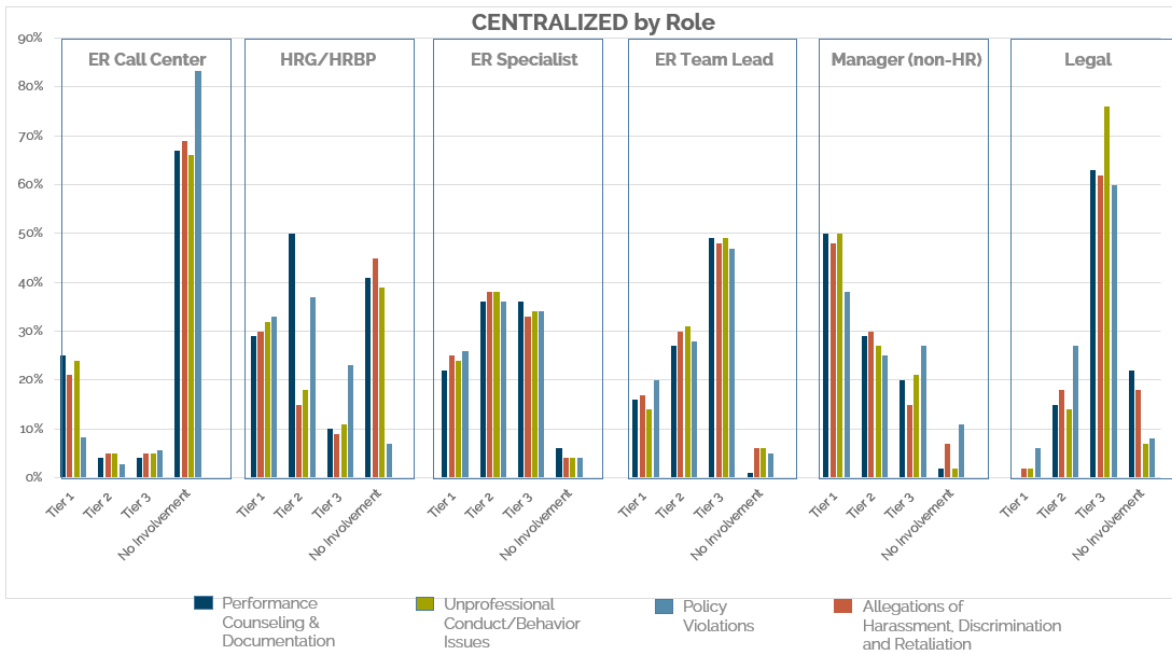
ISSUES MANAGED BY ROLE: Mixed Model
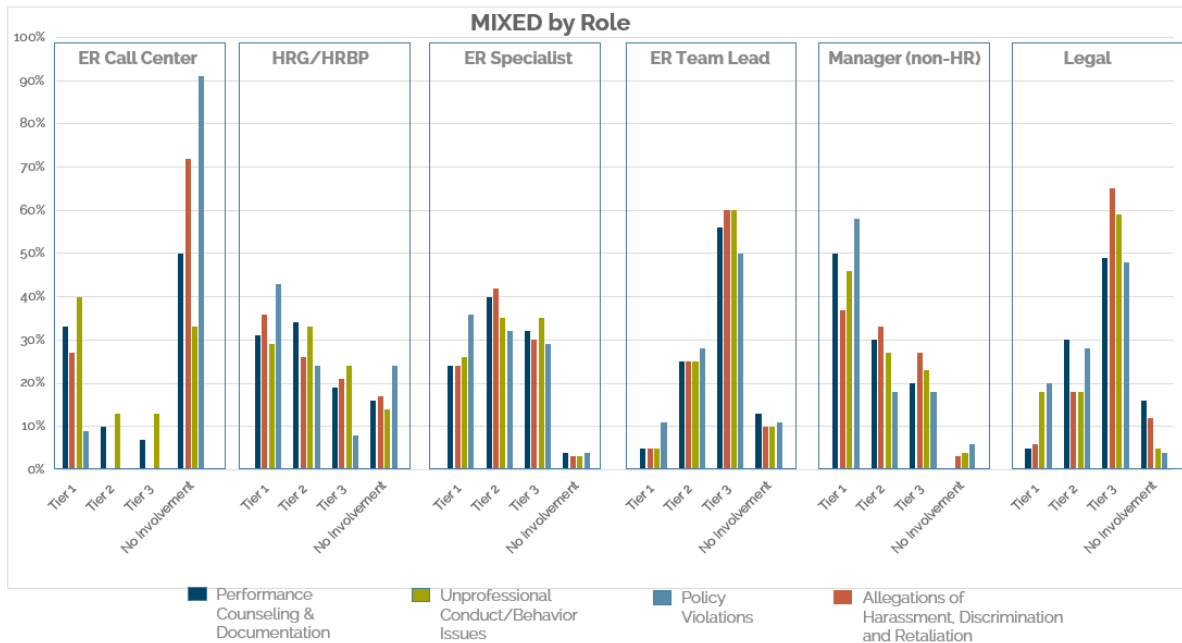
Who Manages What

Issues Managed by ORGANIZATIONAL MODEL: DECENTRALIZED
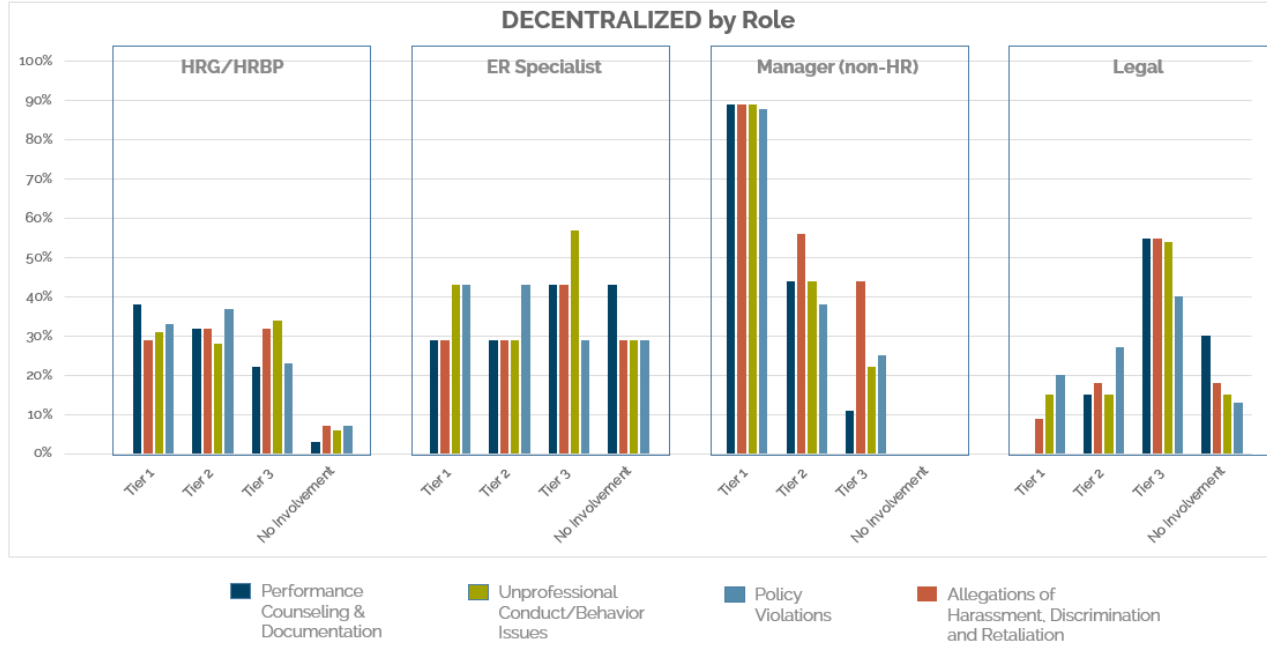
Issues Managed by Role: HR GENERALIST/BUSINESS PARTNER
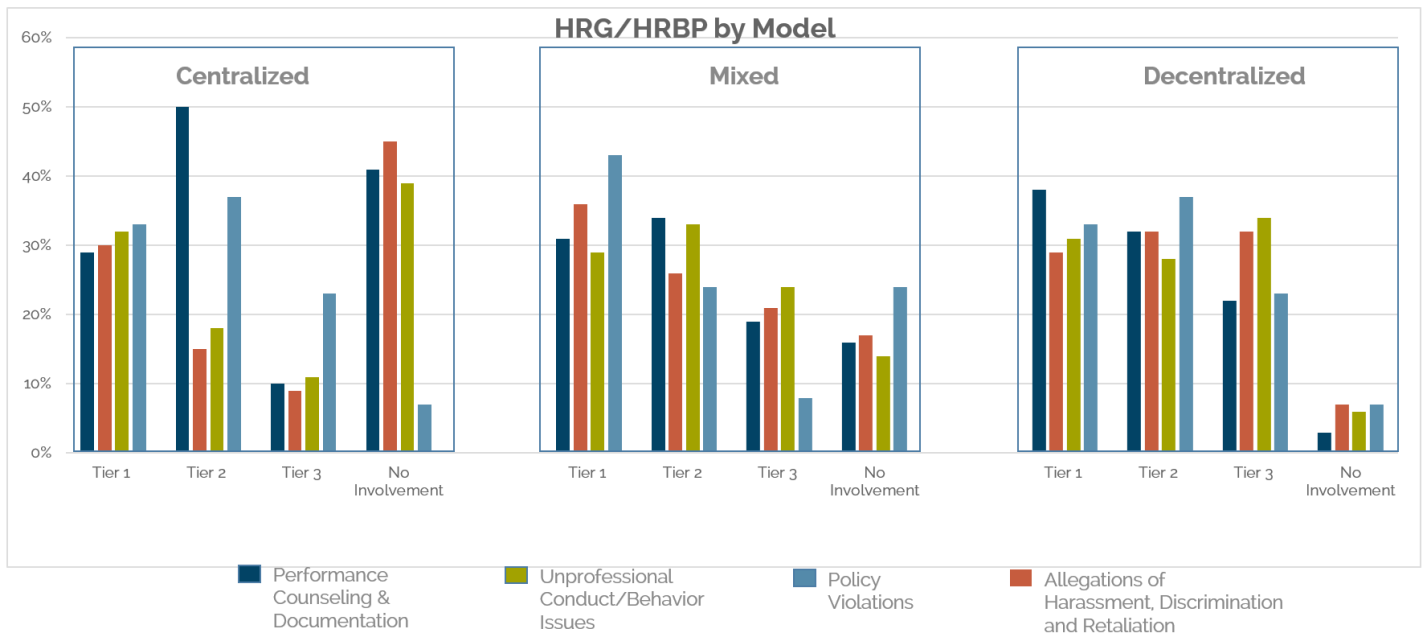
Who Manages What

Issues Managed by Role: EMPLOYEE RELATIONS PROFESSIONAL

ER Specialist by Model

Legend:
- Performance Counseling & Documentation
- Unprofessional Conduct/Behavior Issues
- Policy Violations
- Allegations of Harassment, Discrimination and Retaliation
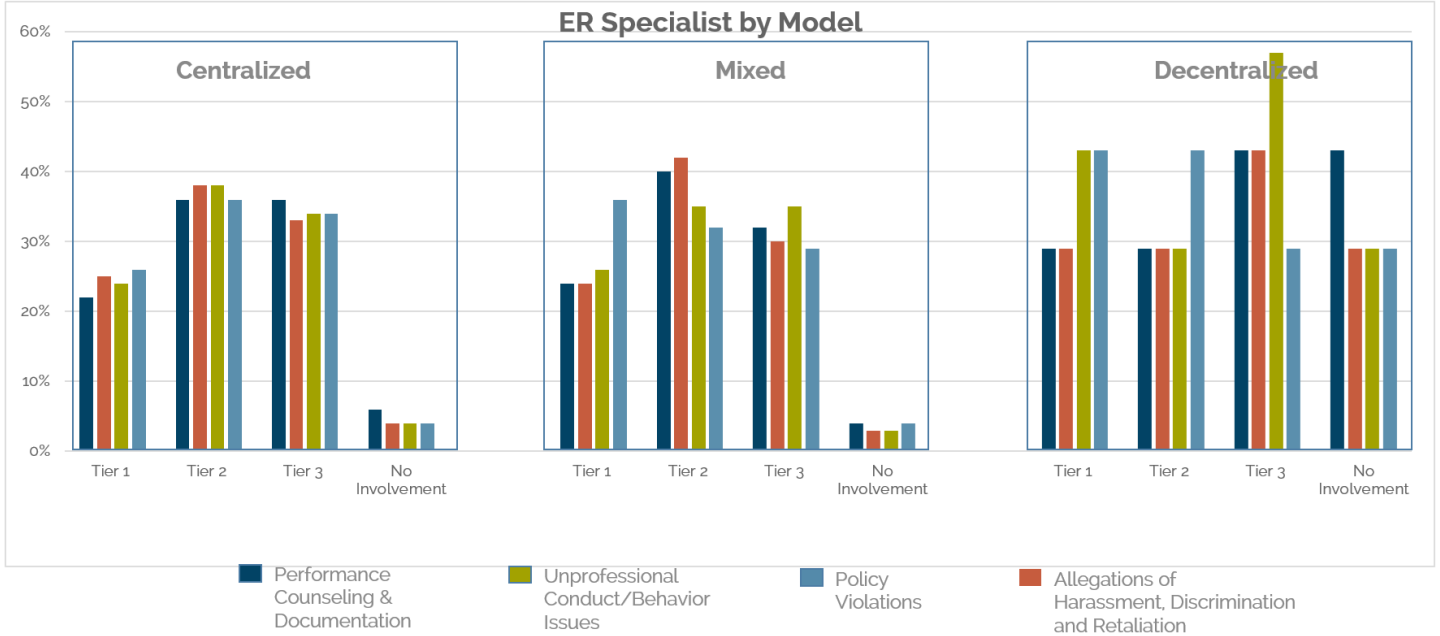
Issues Managed by Role: MANAGER (NON-HR)
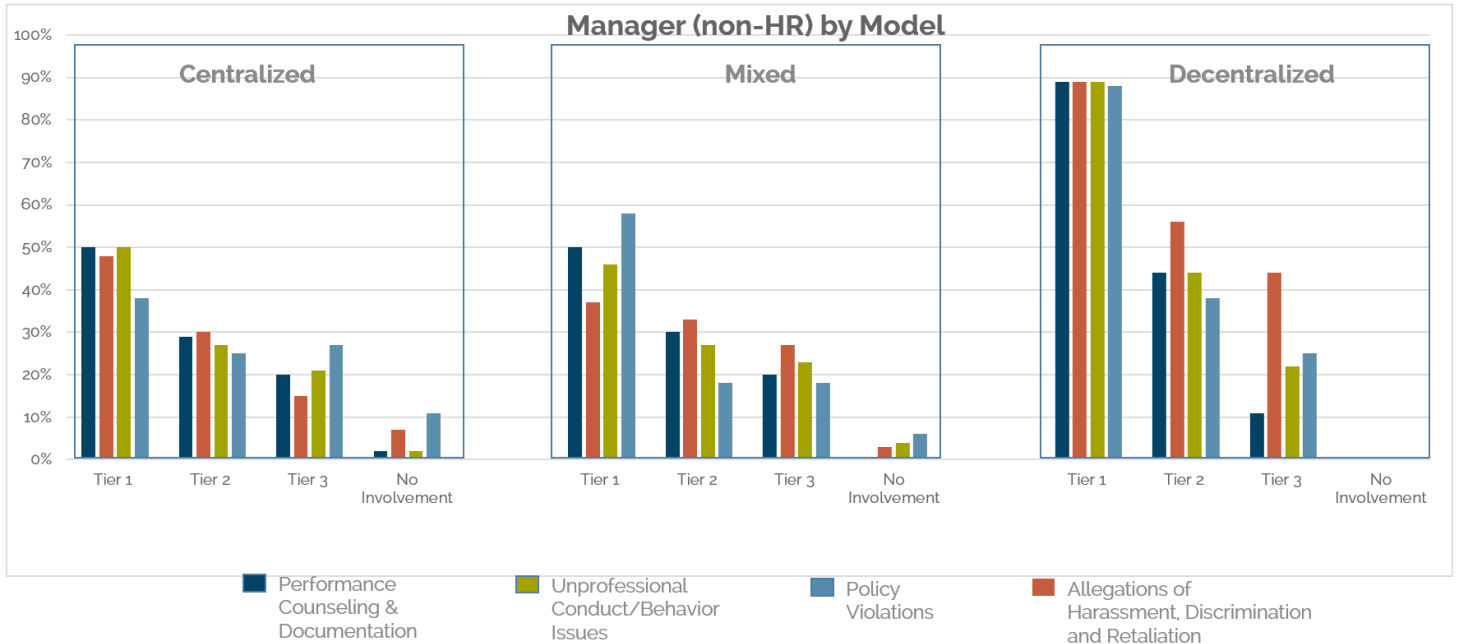
Manager (non-HR) by Model

Legend:
- Performance Counseling & Documentation
- Unprofessional Conduct/Behavior Issues
- Policy Violations
- Allegations of Harassment, Discrimination and Retaliation

Issue Trends and Volume

Issue Trends and Volume

Issue Trends

We asked participants to share their insights, both data driven and situational, regarding increases and decreases in the frequency or complexity of specific issues within their organizations in the past 12 months.

Almost 85% of the respondents shared their input on the opened ended question related to increases. A quick review of the "increase" responses identified clear trends amongst our participating organizations. For example, the word "complex" was used numerous times to describe the change in types of cases that employee relations and HR professionals are managing. Other contributed the increase to management being held to a higher level of accountability, organizational changes, and regulatory demands. Only a handful of respondents cited a decrease in employee-related issues overall, but reiterated that whereas the number declined, the complexity of the cases rose.

Types of and Reasons For Increase in Issues

"Driving accountability to leaders to manage performance issues and holding employee accountable for their performance levels and engagement."

"Increasing demand from employees for better supervision Increase in the number and complexity of ADA accommodation requests; Unprofessional, immature and other inappropriate behaviors; increased turnover; increase in compensation complaints."

"Unprofessional, immature and other in appropriate behaviors."

"Disrespect in the workplace and "bullying" concerns. Trends, it is in the news, younger generation."

"Substantial increase in complexity in part due to ongoing restructuring, educational efforts... and senior management encouraging employees to come forward."

"There has been an increase in complexity of cases and we are attributing this to a re-organization."

"We have seen an increase of frequency and complexity of escalated case work. We would attribute this to a large reduction the company experienced in the last 12 months. Other causes would be a stress in the business to remain competitive, business uncertainty, and the tech marketplace experiencing increased competition."

"As managers taking more focus on addressing performance issues; complaints of harassment/discrimination rise."

"We have seen an increase in ADA cases. Also, an increase in frequency and complexity of FMLA issues."

"We've seen an increase in ER related calls fielded through our third party (Ethics Hotline) anonymous reporting system."

"There has been an increase in volume and complexity of issues because each department/division has an ER Professional dedicated to their unit. Therefore, issues that had not been addressed in the past are now being addressed."

"There is been an increase in the frequency and complexity of all cases in our office. A large increase in cases that involve mental health concerns."

"We've seen an increase in the number of fitness for duty evaluations. For economic reasons employees are retiring at a later age and medical issues are becoming more frequent."

"Increase in social media related cases, cases alleging hostile work environment when in reality it's an employee who doesn't like being held accountable and several of our operational process violations. The first two are more generational, while the latter is because we have new regulations that we have to comply with that employees are still getting used to AND we have a stronger focus on quality and accountability."

"More issues related to personal interactions between employees, bullying, racist/sexist comments."

"A blurring of personal and professional boundaries surrounding social media."

"We have recently seen a rise in language being used. Slang and other acceptable means of referring to each other outside of work being brought into the workplace."

"Transgender and ethic/boundary issues. I attribute the increase due to the increase in transgender progression for rights and extreme poor decision making on the behalf of employees."

"As employees become more aware of their rights and responsibilities (and of HR's role in the organization) they become more willing to report concerns regarding the work environment."

"Increased regulatory activity that varies by State (ban-the-box, city ordinances, etc.). Wage & hour OT litigation due to plaintiff's bar emphasis."

"Mitigating complex leave situations, increased regulatory compliance requirements, evolving practices."

We received far fewer comments from organizations reporting a DECREASE in activity. But that few that provided information gave insight as to how good employee relations management can impact volume:

> *"Overall we have seen a decrease in ER issues over the past 12 months. We attribute this to a stronger training on ER topics delivered to the HR community, thereby increasing the field HR competencies."*
>
> *"Decrease due to employees witnessing the swift and direct response for violations."*

Issue Volume

While all organizations recognize issues will arise, the challenge is to understand what the numbers mean. For example, how many issues of a certain type are too many and how are organizations doing compared to their peers in similarly situated organizations. To help provide these benchmarks, we asked participants to report the number of issues they manage by categories. For those organizations that track employee relations matters, this was easy for them to provide. For others, it underlined the need for gathering this type of data. To normalize the data, we once again calculated the numbers based upon 1,000 employees, for example X number of performance issues per 1,000 employees.

Number of Issues Per 1,000 Employees	
Performance-Related	170.39
Behavioral	31.71
Policy Violations	94.5
Leave Management	67.46
Accommodations	35.6
Terminations - Voluntary/Mutual	88.59
Terminations - Involuntary with Severance	8.15
Terminations - Involuntary without Severance	44.33
Allegations of Discrimination or Harassment (not including any EEOC or admin charges)	4.44
Regulatory Matters(FLSA, OSHA, Workers Comp, Unemployment)	20.69
EEOC or Other Administrative Charges	1.26

Issue Trends and Volume

Percentage of Employee Issues Resulting in Corrective Action

1%
14%
17%
23%
13%
5%
27%
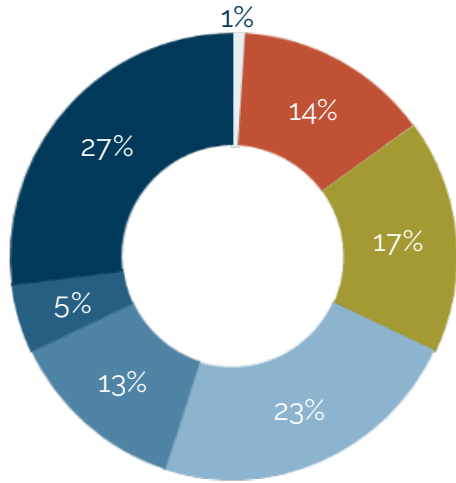
Percentage of Employee Issues Involving Outside Counsel

22%
30%
11%
37%
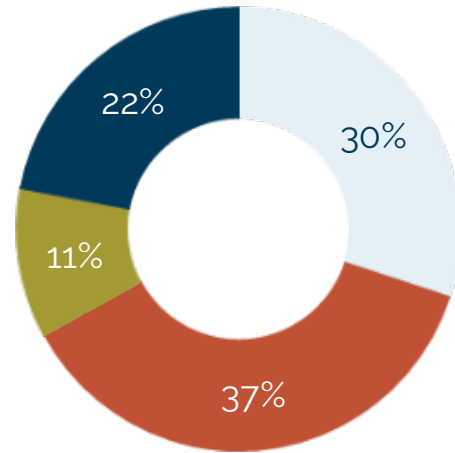
■ <1%   ■ 2% to 10%   ■ 11% to 25%   ■ Don't Track

Circumstances for Paying Severance

■ Involuntary Termination - Performance Related
■ Involuntary Termination - Non-performance Related
■ Involuntary Termination - For Cause
■ Job Elimination/RIF
■ Mutual

88%
42%
28%
28%
11%
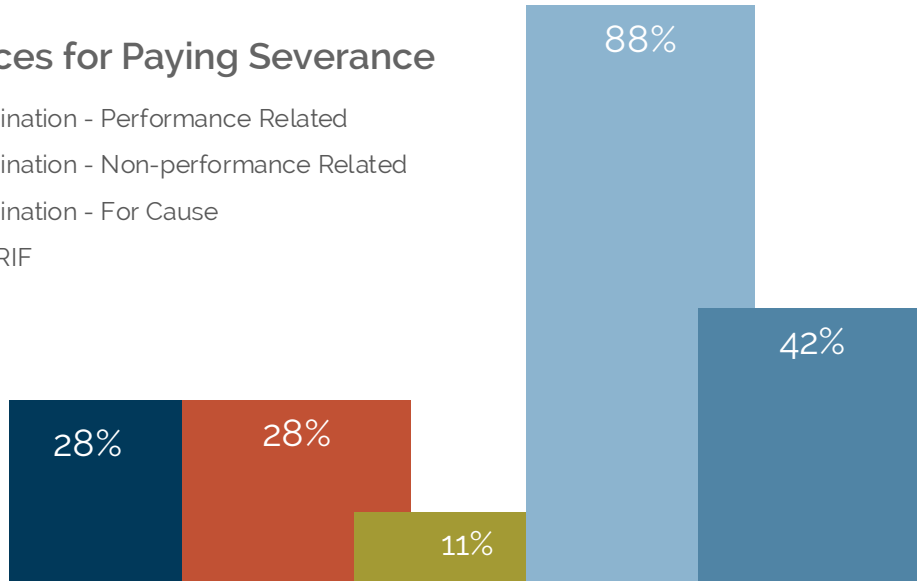
The data by organization size revealed that enterprise (20,000+ employees) organizations were almost twice as likely as the average to pay severance for non-performance related involuntary terminations and mutual terminations. Smaller organizations (<3,500 employees) were the least likely to pay severance in a mutual separation situation.

Looking at the different industries, technology paid severance at a rate more than double (67% versus 29%) than the other industries for performance related involuntary separations.

Metrics & Analytics

Employee Relations Metrics and Analytics continues to be one of the most discussed topics at our Employee Relations Roundtable Events.

Practitioners reported monitoring key metrics that include the number and types of policy violations, case type, location, time to close, outcome and demographics. How they used that information was provided in our open ended-questions, many of the responses we share at the end of this section.

To Whom are Employee Relations Metrics Reported

- Board — 23%
- Senior Leadership (C Suite) — 66%
- Managers — 22%
- Human Resources — 64%
- Legal — 34%
- Compliance — 13%
- Do not use metrics — 13%
- Other — 8%
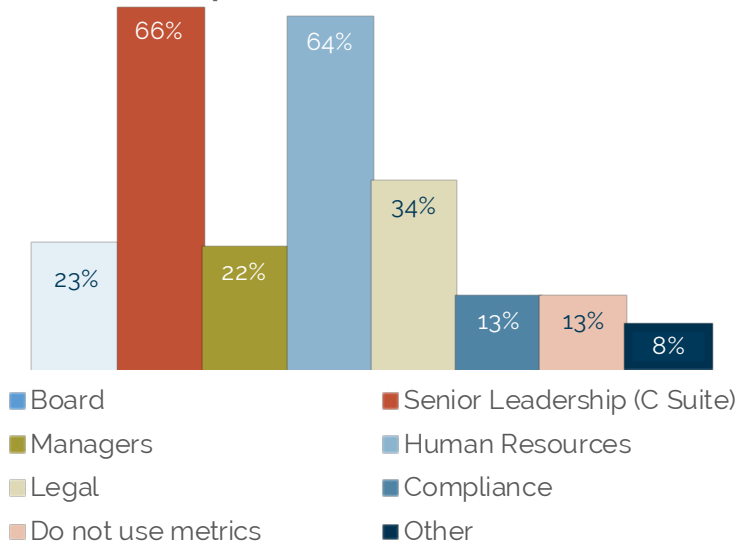
Other Data Integrated with ER Data for Analytics

- Employee Demographics (e.g., gender, age, race, etc.) — 45%
- Performance Ratings — 44%
- Turnover — 58%
- Business Performance — 9%
- Engagement Scores — 25%
- Not applicable — 25%
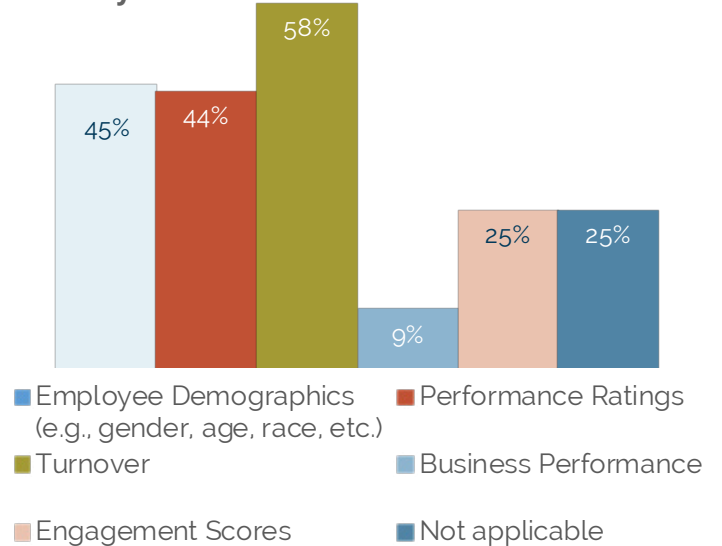
Respondents also reported including information captured from exit interviews, leave utilization, employee expenses, turnover or attrition data, and engagement data.

How are Metrics Currently Being Used

- Used to construct predictive models of employee behavior — 23%
- Obtained for more data-driven employee insights and initiatives — 59%
- Utilized to create better ER policies — 41%
- Gathered, but generally not used — 34%
- Other — 16%
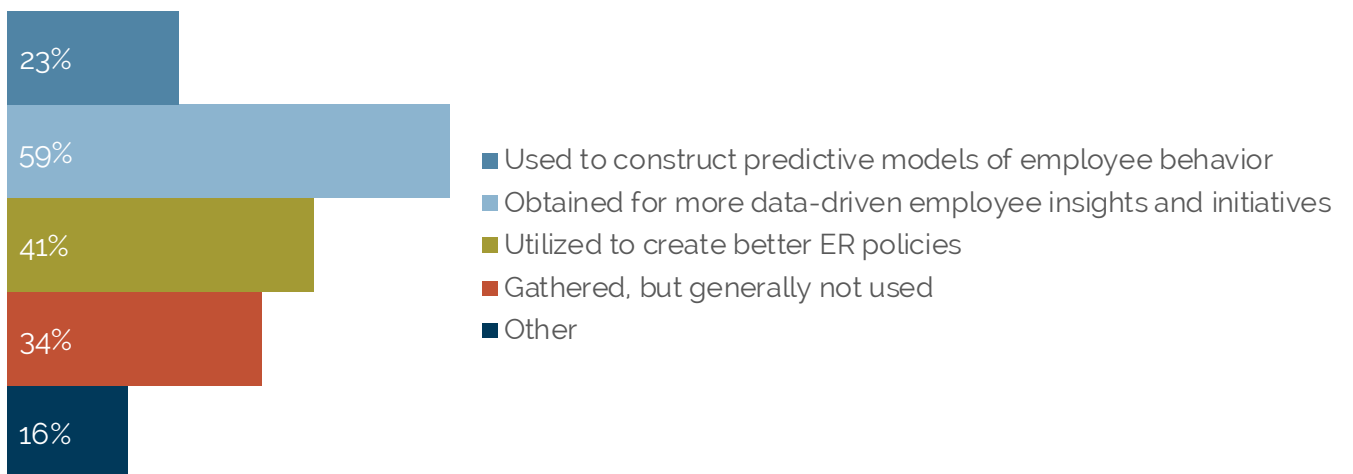
Metrics & Analytics

Following are open-ended comments from Participants regarding use of Employee Relations Analytics to proactively manage the workforce and measure its impact:

"Dashboards are used in discussions with Senior HR and legal. Dashboards are broken down by business, headcount per Quarter, submissions of complaints per Quarter and to level set, ratio of ER issues to headcount for the business, This is done for NA and also Global by business. Year over year numbers and month by month trends are provided to spot high and lower activity months, matters by category... and then a further breakdown by specific issue."

"We were able to demonstrate the top Employee Relations case types and case categories - most utilized for a specific business or function. For example "Performance" is a case type and from there we can break it down by case category: "job fit", "accountability", "skill set", "low sales metrics" and "clinical skill set". We are able to show the % of utilization (ER Case Volume) to % of headcount (client size) for a specific business or function and this tells us if there are pockets or the organization with high/low case volume, underutilization or normal utilization in relation to headcount."

"Quarterly and annual reporting is shared with the HR executive team. This reporting includes employee relations trends, types of employee relations topics consulted on, employee relations activity by business unit, disciplinary action by salary grade, involuntary termination request by salary grade, and involuntary turnover by age, ethnic group and gender."

"We look at number of cases opened, # closed, % SLA achieved, # and % by case type and subtype; outcome by case type and subtype, case type and subtype by rating, all of the above by business line and department."

"Currently we use operational metrics (cases by number, location, leader, type of case, type of outcome). In the future, we would like to interact it with more detailed analytics based on management trainings, success of those trainings etc..."

"We can demonstrate the change/trend of ER case types over a few quarters given our pro-active efforts/training. For example, we had a high number of harassment issues for a few quarters we rolled out a "Respect in the Workplace" training for leaders and managers. In the following few quarters, we were able to see the trends/case volume decrease due to this pro-active training."

"We are able to see the volume of Employee Relation vs. Performance Management cases and assess what is needed to move the needle so we have less risky case volume and more performance management cases. This helps us to identify pro-active efforts, training opportunities and gap analysis."

"Accommodation/Leave training - we have seen a spike in ADA/FMLA cases and pro-actively worked with our vendor, corporate benefits and leave team to administer training for people managers. While this has not necessarily decreased case volume, it has decreased the number of questions coming to the ER team and has empowered leaders to be more involved in the process."

"We have shared exit data trends and have driven pro-active efforts to specific sites: work/life balance efforts such as early release Fridays, career development opportunities such as shadowing and increased stretch assignments. With this data, we are able to meet with leaders, providing the feedback and coaching as necessary."

"Performance management training has actually increased case volume around performance issues, but has driven more accountability to managers to better manage performance issues. This has had a direct result on our severance numbers as we are no longer paying severance for mismanaged performance issues, resulting in less risk to the organization and a substantial cost savings. We are minimizing the risk to the organization, managing performance and holding leaders and employees accountable."

"On several occasions we have been able to pull ER data that helps build a business case for changing our leave policies, for helping a leader understand the types and number of complaints and issues we are seeing in a specific department and helps tell the story on the ER work for our quarterly HR business reviews."

"We analyze trends in consultation to identify gaps in field HR competencies or to identify trends in employee behaviors in order to create and deliver training on ER topics."

"Dashboard information is shared with business leaders to assess the health of their respective business units. This data provides insight into the development of action plans to help address critical areas of concern, if deemed appropriate."

"The metrics help to identify possible opportunities for enhancements to recruiting, onboarding, retention, development, etc. If trends are found we work with COEs, ERGs, etc. to help enhance or develop offerings as well as policy reviews."

"One of the primary reasons we see for involuntary leave is not because of performance, it is because of an ER issue (conduct, manipulation, policy violations, etc.) so we focus on those top reasons and target training for specific groups/regions, etc. to reduce turnover."

"We've been able to isolate down to the department and manager potential issues and been able to provide targeted training; we've been able to identify areas that additional communication or manager toolkits could prevent issues; we have been able to identify managers that are not comfortable delivering corrective action and as a result were seeing higher turnover and rebuttal claims."

About HR Acuity

HR Acuity® is the leading provider of employee relations and workplace investigation solutions. By combining its "HR-First" methodology and state of the art software, HR Acuity® enables organizations to reduce costs and mitigate the legal, financial and reputational risks associated with adverse employee-related events.

Our award winning Employee Relations Management System

HRACUITY™
On-Demand

standardizes how employee-related events are managed, documented, and followed-through to completion.

Structured Investigations

The HR Acuity® 3-Step Investigation Process provides HR Professionals with a dynamic blueprint for conducting thorough and accurate fact finding.

Consistent Documentation

Proper and consistent documentation of employee issues ensures fair treatment of employees and protects your organization.

Powerful Analytics, Proactive Intelligence

Instantaneous and flexible analytics enable objective and proactive analysis of employee behaviors, managerial impact and workplace engagement.

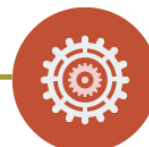### Engaging the Workforce from Start to Finish

The Post-Hire and Exit Interviews provide an effective way to capture invaluable information from your new and departing employees.

THE HR ACUITY®
3-STEP PROCESS:
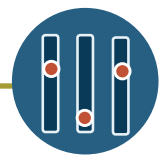
PLAN — INVESTIGATE — DETERMINE

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Appendix: Overall Data

Appendix: Overall Data

CONSOLIDATED INDUSTRY	
Technology	13%
Financial/Insurance/Professional Services	18%
Healthcare/Pharma	25%
Education	26%
Other	18%

Is your organization classified as:	
Public	56%
Private	26%
Government	4%
Nonprofit	14%
TOTAL	100%

What is your organization's annual revenue? If your organization is a nonprofit, please indicate your annual budget.	
<$100 million	15%
$101 million to $999 million	29%
$1B - $5B	27%
$5.1B - $10B	11%
>$10B	18%
TOTAL	100%

Is your organization:	
Global	44%
Primarily US-based, but some regional presences	13%
US-based only	43%
TOTAL	100%

CONSOLIDATED RANGE OF US EMPLOYEES	
<3,500	30%
3,500 - 9,999	30%
10,000 - 19,999	20%
20,000+	20%
TOTAL	100%

To help us understand if there are generational differences that impact employee relations matters, please provide the average age of your employees in the US:	
<25	0%
26 to 35	18%
36 to 45	51%
45+	16%
Prefer not to answer	15%
TOTAL	100%

Does your organization have collective bargaining units?	
Yes - US only	24%
Yes - Outside the US only	17%
Yes - In different global regions including the US	10%
No	49%
TOTAL	100%

Does your organization require employees to sign arbitration agreements as a term of employment?	
Yes, some	8%
Yes, all	7%
No	85%
TOTAL	100%

Does your organization have in-house lawyers dedicated to labor and employment matters? (exclude Employee Relations Professionals who may have a legal background but are not practicing as such for your organization)	
Yes	68%
No	32%
TOTAL	100%

Which statement best describes your current employee relations Model in the US?	
CENTRALIZED: There is a Centralized team of Employee Relations Professionals or Center of Excellence ("COE") responsible for managing employee relations issues and conducting investigations across the organization. (Note this group does not have to be geographically Centralized)	61%
MIXED: There is a Centralized group for managing some or most of the employee relations cases and investigations but field resources (HR Generalists, Business Partners and/or managers) still manage some employee relations issues.	26%
DECENTRALIZED: Employee relations issues are managed within the specific lines of business by HR Generalists, Business Partners or Employee Relations Professionals. Employee Relations matters are not Centralized.	13%
TOTAL	100%

Is your organization considering moving to a Centralized or Center of Excellence (COE) Model in the future?	
Yes within the next 12 months	14%
Under consideration for the future	25%
No current plans to change Model	61%
TOTAL	100%

Within your Centralized or COE Model, do your Employee Relations Professionals work:	
In a singular corporate center	50%
In different geographic locations	21%
Mixes. Some portion of the team is Centralized while others work in Decentralized locations	29%
TOTAL	100%

How are employee issues assigned? (choose one primary and one secondary)

	By line of business	Auto-assigned	Geographically assigned	First in, First out	By complexity	By subject matter	Other	Not applicable
Primary Method Used	28%	5%	19%	14%	14%	10%	5%	5%
Secondary Method Used	0%	0%	11%	8%	36%	17%	17%	11%

Appendix: Overall Data

On average, how many employee issues are assigned to each Employee Relations Professional at any given time? (e.g., consultations, inquiries, coaching, investigations)	
<5	14%
6 to 10	31%
11 to 25	41%
26 - 35	7%
36+	7%
TOTAL	100%

What additional functions are managed by the Centralized Team/COE (choose all that apply)?	
Pro-active Employee Relations Training	79%
Required Employee Relations Training (e.g. Harassment, Code of Conduct, etc.)	76%
Policy Oversight/Governance	83%
Policy Development or Benchmarking	76%
Employee Relations Analytics	88%
Engagement Initiatives	41%
Exit Surveys	55%
Alternative Dispute Resolution	33%
Other (provide details)	24%

Does your Centralized Team/COE have Service Level Agreements (SLAs)?	
Formal SLAs in place	0%
Informal guidelines in place	22%
No SLAs used	64%
If SLAs are in place, please describe WHAT is measured and HOW data is captured?	14%
TOTAL	100%

What method best describes how investigations are conducted within your organization in the US?	
Our organization has required forms and templates for conducting investigations.	23%
Our organization provides suggested/sample forms and templates for conducting investigation, but these are not required.	41%
There are no specific guidelines or processes for conducting investigations.	36%
TOTAL	100%

How does your organization primarily store documentation created as a result of an employee relations issue in the US?	
HRBP or ER Professional maintains own documentation.	22%
Documentation is maintained on a shared drive.	6%
Documentation is maintained in a Case Management System,	31%
Mixed. Some combination of case management system, shared drive, or personal storage	41%
TOTAL	100%

How does your organization primarily track employee relations issues in the US? (Choose all that apply)	
Excel spreadsheets or similar	27%
Access or other database	7%
Employee Relations/HR Case Management system	47%
HRIS	5%
Don't Track	14%
TOTAL	100%

Does your organization plan on transitioning to an employee relations/HR case management system?	
Yes, within the next 12 months	30%
Yes, in the future (greater than 12 months)	19%
No plans for transitioning	51%
TOTAL	100%

Does your organization plan on switching to another employee relations case management system?	
In the next 12 months	9%
In the future (greater than 12 months)	9%
No plans for transitioning	82%
TOTAL	100%

In the US, to whom do these roles or functions directly report?	Line of Business	Corporate HR	Shared Services	Legal	Compliance	Other
Human Resource Business Partners/Generalists	19%	67%	7%	0%	0%	7%
Center of Excellence /Employee Relations Team	7%	70%	13%	2%	0%	8%
Employee Relations Professionals	11%	67%	14%	1%	0%	7%

What percentage of your US employee-related issues resulted in corrective action in 2015?	
<1%	1%
2% to 10%	14%
11% to 25%	17%
26% to 50%	23%
51% to 75%	13%
>76%	5%
Don't Track	27%
TOTAL	100%

What percentage of your organization's US employee relations matters involve legal assistance from outside counsel?	
<1%	30%
2% to 10%	37%
11% to 25%	11%
26% to 50%	0%
51% to 75%	0%
>76%	0%
Don't Track	22%
TOTAL	100%

Appendix: Overall Data

Under what circumstances do you generally pay severance in the US? (choose all that apply)	
Involuntary terminations - Performance Related	28%
Involuntary terminations - Non-performance Related	28%
Involuntary terminations - For Cause	11%
Job elimination/RIF	88%
Mutual	42%

To whom in your organization do you report metrics related to employee relations activities (choose all that apply)?	
Board	23%
Senior Leadership (C-Suite)	66%
Managers	22%
Human Resources	64%
Legal	34%
Compliance	13%
Do not use metrics	13%
Other (please specify)	8%

How are metrics currently used (choose all that apply)?	
Used to construct predictive Models of employee behavior	16%
Obtained for more data-driven employee insights and initiatives	59%
Utilized to create better ER policies	41%
Gathered, but not really used	34%
Other (please specify)	23%

What other data do you integrate with employee relations data for further analysis?	
Employee Demographics (e.g. gender, age, race, etc.)	45%
Performance Ratings	44%
Turnover	58%
Business Performance	9%
Engagement Scores	25%
Not applicable	25%