

Organizational Complexity (OC) – Scoring Scale

1 – Minimal Complexity

HR supports a small, centralized workforce with mostly interchangeable roles. No union contracts, civil-service systems, or alternate pay frameworks exist. All staff follow the same schedules, rules, and benefits. Department structures are straightforward, and HR rarely encounters position-specific variations.

1.5 – Near-Minimal Complexity

Still non-union and largely uniform, but HR supports a few departments with unique operational needs—such as seasonal parks crews or safety-sensitive utility staff. Occasional adjustments are required for differing schedules, work conditions, or licensing, though the organization's structure remains simple.

2 – Low Complexity

One collective bargaining agreement or a basic civil-service overlay adds modest variation. A few operational groups require distinct pay rules, safety procedures, or shift patterns. HR makes targeted adjustments for specialized roles but maintains largely consistent systems and policies across the workforce.

2.5 – Low-to-Moderate Complexity

HR supports several functionally distinct units with growing variation in schedules, classifications, or hiring requirements. A union or civil-service system may apply only to part of the workforce. Classification, pay, and scheduling rules begin to diverge between departments, requiring more individualized handling.

3 – Moderate Complexity

HR manages multiple labor frameworks or personnel rule sets. The workforce includes field crews, licensed professionals, shift-based teams, and supervisory layers. Policies require department-specific interpretation, and classification, pay, or scheduling decisions often span multiple operational models.

3.5 – Moderate-to-High Complexity

Departmental personnel practices differ significantly. Some units maintain unique onboarding, credentialing, or staffing procedures. HR regularly resolves exceptions involving job ladders, differential pay, or specialized work schedules, coordinating across divisions with different norms and labor expectations.

4 – High Complexity

Departments operate with semi-autonomous job structures and bargaining constraints. HR supports a wide variety of job families, each with distinct progression paths, allowances, or exceptions. Interdepartmental equity issues, union coordination, and diverse HR workflows create frequent nonstandard cases.

4.5 – High-to-Very High Complexity

Departments exercise strong influence over their own personnel practices, sometimes challenging HR's ability to maintain consistency. Overlapping labor agreements, past precedents, and internal politics shape workflows. HR operates in a matrixed environment requiring careful navigation of competing rules and interpretations.

5 – Very High Complexity

The organization has deeply layered job structures, multiple bargaining units, civil-service requirements, and widely differing operational rhythms. Licensing mandates, political factors, and conflicting personnel systems intersect daily. HR must reconcile incompatible policies, manage sensitive disputes, and sustain operations in a constantly shifting environment.

Compliance & Legal Exposure (CR) – Scoring Scale

1 – Minimal Exposure

HR manages only basic employment requirements such as FLSA wage/hour rules and I-9 verification. No civil-service rules, grant compliance, or formal CDL/DOT oversight applies. Workplace injuries are rare, and no drug or alcohol testing program is in place. Compliance tasks are infrequent and require minimal documentation.

1.5 – Near-Minimal Exposure

Some leave management (e.g., FMLA) and occasional ADA accommodation discussions occur. A small number of CDL holders may exist in DPW or utilities, but compliance is handled directly by supervisors with little HR involvement. Workers' comp cases are rare and uncomplicated.

2 – Basic Exposure

HR regularly applies core federal rules (FLSA, FMLA, ADA) and manages periodic workers' comp claims, safety incidents, and accommodation requests. CDL compliance may apply to a modest portion of the workforce (e.g., DPW/highway crews), requiring occasional coordination for medical cards, drug/alcohol testing, and recordkeeping. No civil-service framework or grant-specific rules are in place.

2.5 – Early Moderate Exposure

HR maintains compliance systems and templates for recurring needs such as light-duty assignments, CDL driver qualification files, and drug/alcohol testing logs. Supervisors are trained to flag issues, and HR plays an active role in tracking and scheduling compliance requirements. Most cases are resolved without formal escalation.

3 – Moderate Exposure

HR administers multiple overlapping regulations—FMLA, ADA, FLSA, OSHA, workers' comp, and ongoing CDL compliance across multiple departments. Some civil-service or grant rules may apply. HR proactively monitors practices, maintains centralized documentation, and trains supervisors on compliance-sensitive areas.

3.5 – Moderately High Exposure

HR manages multiple leave types, ADA cases, and job-protected absences concurrently. CDL compliance is significant, covering multiple operational divisions (e.g., DPW, utilities, transit, public safety). Safety reporting and return-to-work coordination are embedded in daily operations. Civil-service testing or grant requirements add procedural layers.

4 – High Exposure

Compliance requirements are fully integrated into HR's daily work. HR leads accommodation meetings, oversees CDL compliance programs including drug/alcohol testing administration, coordinates safety audits, and manages multiple funding streams with distinct employment rules. Civil-service regulations influence hiring, discipline, and promotion.

4.5 – Very High Exposure

HR navigates a steady flow of high-risk matters such as discrimination complaints, contested policy interpretations, audit findings, and CDL violations. Cross-department coordination is essential for consistent enforcement. Records must be audit-ready at all times, and legal counsel involvement is frequent.

5 – Extremely High Exposure

The HR environment is highly regulated, multi-layered, and under frequent internal and external scrutiny. CDL, OSHA, civil-service, grant compliance, and multiple overlapping mandates intersect daily. HR works closely with legal counsel, manages enterprise-wide compliance systems, and devotes significant capacity to preventing, investigating, and resolving compliance failures. Noncompliance risk is constant and resource-intensive.

Workforce Volatility (WV) – Scoring Scale

1 – Minimal Volatility

The workforce is long-tenured and stable. Turnover is rare, generally anticipated (e.g., retirements), and easily planned for. No meaningful seasonal or temporary hiring. Recruitment and separations are infrequent and occur without operational strain. HR's workload in this area is minimal and steady throughout the year.

1.5 – Near-Minimal Volatility

Most departments maintain stable staffing year-round. Occasional vacancies arise but are quickly filled from a reliable candidate pool. Some part-time or short-term hires may occur (e.g., election clerks, seasonal parks workers), but volume is small and fits easily into normal workflows.

2 – Low-to-Moderate Volatility

Turnover occurs regularly in one or two job groups (e.g., clerical support, entry-level DPW laborers). HR manages modest seasonal hiring cycles such as summer help, parks maintenance crews, or election staffing. Workload is predictable and generally spread across the year.

2.5 – Moderate Volatility

Specific roles—such as CNAs in long-term care, food service staff, or patrol officers—have consistent turnover. HR manages several recruitments at once. Seasonal cycles require targeted onboarding efforts (e.g., aquatics staff, recreation aides) but remain time-limited and well understood.

3 – Moderate-to-High Volatility

Multiple departments experience regular staffing instability. Vacancies may remain open for weeks or months due to competitive labor markets. Overlapping retirements, internal transfers, and seasonal hiring cycles create periods where HR must juggle competing priorities across departments.

3.5 – High Volatility

Turnover is built into operations for key services (e.g., jail corrections, public safety dispatch, nursing home staff, snowplow operators). Internal movement generates continual openings. Seasonal hiring is large enough to require bulk onboarding events, and HR has little downtime between cycles.

4 – Very High Volatility

Seasonal hiring becomes a major function—HR recruits, screens, and onboards large pools of temporary workers (e.g., lifeguards, rec staff, poll workers) under tight timelines. Core departments sustain elevated vacancy rates year-round, making recruitment the dominant HR activity.

4.5 – Extremely High Volatility

Seasonal workforce needs resemble running a second organization, with hundreds of hires each year on fixed deadlines. High-turnover full-time roles remain open or cycle quickly. HR frequently enters “emergency hiring” mode before completing prior recruitment rounds.

5 – Severe Volatility

Staffing instability is constant across the organization. HR operates in perpetual high-volume recruitment mode due to retirements, resignations, transfers, and major seasonal surges. Critical vacancies directly affect service delivery. Onboarding is continuous, stretching HR systems and staff beyond planned capacity.

Payroll Responsibility (PR) – Scoring Scale

1 – Minimal Responsibility

HR has no involvement in payroll processing. Finance (or a contracted provider) manages all timekeeping, pay entry, payroll processing, and wage reporting. HR may receive summary reports or payroll calendars but does not handle pay-related tasks or field employee payroll questions.

1.5 – Near-Minimal Responsibility

HR's payroll role is limited to approving job offers and pay rates. Payroll and timekeeping are managed entirely by Finance or an external provider. HR occasionally coordinates with Finance to address employee pay questions or correct isolated errors.

2 – Limited Responsibility

HR provides payroll-related data—such as pay rates, step increases, job changes, or leave status updates—but another department handles data entry and check processing. HR may review timecard exceptions, verify pay adjustments, or assist with payroll-related audits, but it does not manage system accuracy or compliance.

2.5 – Partial Responsibility

HR shares payroll responsibilities with Finance. HR enters certain pay data (e.g., step increases, FMLA or leave impacts, reclassifications) and assists with reconciliations, while Finance runs the payroll. Timekeeping support is split between departments. Collaboration is regular but workload remains modest.

3 – Moderate Responsibility

HR maintains most pay-rate and classification data in the payroll system, reviews and validates timecards, and ensures accuracy before payroll submission. Payroll is processed elsewhere, but HR is the primary contact for resolving errors, calculating retro pay, and ensuring compliance with wage laws and contract provisions.

3.5 – Moderately High Responsibility

HR is responsible for timekeeping accuracy and payroll data entry across all departments. While Finance still runs the final payroll process, HR actively monitors system integrity, answers employee pay questions, and ensures compliance with wage laws, CBAs, and accrual policies.

4 – High Responsibility

HR is responsible for all pay-entry, timecard validation, and payroll reporting. Finance's role is limited to issuing payments. HR tracks retroactive adjustments, processes corrections, manages compliance with CBAs, and answers nearly all payroll inquiries. Payroll accuracy is a direct measure of HR performance.

4.5 – Very High Responsibility

HR manages nearly all payroll operations—data entry, validation, compliance checks, communication, and payroll-related audits. Finance is involved only in technical payment execution. HR prepares bargaining and budget payroll reports, and accuracy of system data is mission-critical to operations.

5 – Full Payroll Ownership

HR owns the complete payroll process, from timekeeping administration through final submission, including system configuration, compliance oversight, garnishment processing, W-2 coordination, and year-end reconciliation. All payroll accuracy and timeliness responsibility rests with HR, and staffing must support uninterrupted payroll cycles without backup from other departments.

Safety & Risk Responsibility (SR) – Scoring Scale

1 – Minimal Responsibility

HR has no role in safety or risk management. OSHA compliance, accident reporting, CDL/DOT requirements, and workers' compensation are managed entirely by another entity—such as a dedicated safety/risk

management department, a coordinator embedded in another department, or an outside provider. HR may receive copies of incident reports but plays no role in investigations, training, or prevention.

1.5 – Near-Minimal Responsibility

HR is occasionally consulted on incident reports or employee injuries but does not lead or coordinate the response. Workers' comp is managed by another entity—such as a risk/safety coordinator, another department, or a contracted provider. HR's role is limited to relaying information, forwarding documentation, or providing minimal administrative support.

2 – Limited Responsibility

HR tracks injuries, files workers' comp paperwork, and maintains required records but does not lead investigations or oversee safety programs. HR may sit on a safety committee coordinated by another department or a designated safety/risk coordinator but acts mainly in a supporting role. Daily safety compliance remains with operating departments or supervisors.

2.5 – Partial Responsibility

HR shares responsibility for accident reporting, recordkeeping, and workers' comp claim coordination. A safety/risk coordinator (or another department) may manage safety training, but HR ensures compliance documentation is complete and deadlines are met. HR may follow up on return-to-work or modified-duty cases in partnership with the responsible department or coordinator.

3 – Moderate Responsibility

HR coordinates workers' comp claims, maintains OSHA logs, tracks CDL/DOT compliance for safety-sensitive positions, and facilitates return-to-work programs. HR may review incident reports, identify trends, and lead or co-lead safety committee meetings with another department or a safety/risk coordinator. Departments still manage operational safety, but HR plays a formal coordinating role.

3.5 – Moderately High Responsibility

HR leads post-incident response, ensures investigations meet documentation standards, arranges light-duty or transitional assignments, and coordinates with insurers or TPAs. HR may deliver safety or ergonomic training in collaboration with operating departments or a safety/risk coordinator, especially for office, field, or public safety roles.

4 – High Responsibility

HR designs or manages core organizational safety programs, including OSHA compliance, ergonomic assessments, risk trend analysis, and coordination of department-level safety training. HR leads injury investigations, partners with legal/insurance on claims, and works with any embedded safety/risk personnel to ensure policies align with prevention goals.

4.5 – Very High Responsibility

HR oversees safety functions across multiple high-risk areas—such as highways, law enforcement, utilities, and long-term care. HR maintains the central reporting and compliance system, updates safety policies, and leads internal audits or regulatory responses. Safety and risk management are clearly defined HR functions, even when delivered in partnership with a dedicated safety/risk coordinator or embedded role.

5 – Full Safety & Risk Ownership

HR owns all safety and risk functions, including program design, compliance audits (OSHA/DOT), accident prevention initiatives, safety training delivery, return-to-work administration, and internal investigations. Whether or not a safety/risk coordinator exists elsewhere, HR serves as the system owner for both prevention and post-incident processes across the organization, with direct responsibility for risk outcomes.

Training & Organizational Development (TR) – Scoring Scale

1 – Minimal Responsibility

HR has no formal training or organizational development duties. Departments handle new-hire onboarding and all job-specific training independently. No internal training calendar or centralized tracking system exists. Compliance or safety training, if required, is handled by another entity such as risk management, a safety coordinator, or an external provider.

1.5 – Near-Minimal Responsibility

HR distributes onboarding packets and tracks deadlines for required compliance training (e.g., harassment prevention, safety) but does not design or deliver courses. Department supervisors manage new-hire orientation without HR-led programming or centralized oversight.

2 – Limited Responsibility

HR coordinates basic onboarding sessions, monitors completion of mandatory compliance courses, and issues reminders to departments about training due dates. No structured training program exists beyond required topics. HR's role in training is primarily clerical and administrative.

2.5 – Partial Responsibility

HR organizes periodic training events (e.g., harassment prevention, timekeeping system training, benefits orientation) and ensures required courses are completed. Some onboarding is centrally delivered by HR. There is no leadership development program or learning management system (LMS), but HR's involvement in training logistics is growing.

3 – Moderate Responsibility

HR owns delivery of onboarding for all new hires, manages an organization-wide training calendar, and coordinates with departments to meet compliance and certification requirements. Some elective or skill-based training is offered internally. Training completion is tracked manually or through a shared system. There is no formal succession planning framework.

3.5 – Moderately High Responsibility

HR delivers both compliance and professional development training, including new supervisor onboarding, communication skills, or customer service workshops. Departments may assist with technical or role-specific delivery, but HR ensures consistency and centralized tracking. HR is beginning to design career development or leadership pathways.

4 – High Responsibility

HR manages a structured training program that includes onboarding, required certifications, soft skills, and supervisory/management development. It maintains a training log or LMS, coordinates internal and external instructors, and ensures policies and programs reflect organizational learning goals. HR advises leadership on emerging training needs and skill gaps.

4.5 – Very High Responsibility

HR delivers an enterprise-wide training and development strategy, owns and administers the LMS platform, and supports succession planning and promotional readiness programs. Departments collaborate with HR to create career tracks and leadership pipelines. HR collects feedback, evaluates program effectiveness, and updates offerings annually.

5 – Full Organizational Development Ownership

HR leads all organizational development initiatives—from onboarding and technical training to executive coaching and leadership academies. It manages LMS data and vendor contracts, maintains competency

models, and links training programs to retention, engagement, and succession strategies. Workforce development is a fully integrated strategic function of HR.

Labor Relations Load (LR) – Scoring Scale

1 – No Labor Load

The organization has no union contracts or comparable frameworks. All employees are at-will or covered by a single personnel policy. HR has no role in negotiations, grievance handling, or discipline coordination beyond routine supervisory guidance.

1.5 – Near-Zero Load

One bargaining unit exists, but labor activity is minimal. The CBA is stable with infrequent changes. HR's role is limited to occasional contract interpretation and annual reminders of key provisions. Grievances are rare, and negotiations occur infrequently with little complexity.

2 – Light Load

One or two CBAs are in place. HR answers contract interpretation questions, processes occasional grievances, and advises supervisors during routine discipline. Investigations are handled jointly with legal counsel or department heads. Negotiations occur every few years and are generally straightforward.

2.5 – Low-to-Moderate Load

Grievance activity is steady and involves multiple departments. HR assists with investigations, prepares documentation, and supports negotiation planning and implementation. Union meetings or consultations occur semi-regularly. Labor relations requires procedural consistency and careful coordination between HR, supervisors, and legal counsel.

3 – Moderate Load

HR manages ongoing labor relations issues across multiple bargaining units. Responsibilities include advising supervisors on progressive discipline, drafting grievance responses, and developing contract implementation plans. Negotiations or interest arbitration occur on a regular cycle, requiring HR to coordinate scheduling, costing, and legal strategy.

3.5 – Moderately High Load

Three or more CBAs are active, often with overlapping negotiation timelines or differing grievance steps. HR leads or co-leads bargaining, manages the intake of most formal complaints, and oversees investigation documentation, witness coordination, and response preparation as routine functions.

4 – High Load

Labor relations is a defined specialty within HR. Multiple CBAs with distinct provisions require frequent interpretation, mid-contract adjustments, and management of side letters. HR handles a high volume of grievances and leads discipline investigations from start to finish. Regular engagement with union representatives and legal counsel is required.

4.5 – Very High Load

HR is engaged in continuous labor relations activity, balancing contract preparation, arbitration support, workplace dispute resolution, and regular interaction with multiple union locals. Investigations are often contested and time-sensitive. Grievance and bargaining cycles run in parallel, driving a significant share of HR's workload.

5 – Full Labor Relations Ownership

Labor relations dominates HR's function. Five or more bargaining units exist, each with unique timelines, procedures, and work rules. HR leads or supports negotiations, arbitrations, fact-finding, and major investigations. Dedicated HR staff or outside labor relations consultants are essential to managing the workload.

Total Rewards Administration (TRW) – Scoring Scale

1 – Minimal Responsibility

HR plays no role in compensation system design or benefit plan administration. Benefits are fully external (e.g., state health plan), and the pay system is set elsewhere. HR's role is limited to benefit enrollment facilitation and verifying pay rates or grades for accuracy at hire.

1.5 – Near-Minimal Responsibility

HR handles routine benefit paperwork (e.g., open enrollment, vendor forms) and verifies pay steps/grades during hiring. It may provide occasional input on job classifications but has no role in setting pay ranges or benefits strategy.

2 – Limited Responsibility

HR maintains pay tables for accuracy, processes basic benefit changes, and helps resolve simple compensation or benefits questions. Benefits are mostly externally managed, and the pay plan is set by others, though HR ensures day-to-day compliance with both.

2.5 – Low-to-Moderate Responsibility

HR manages routine benefit changes, ACA/COBRA filings, and provides supervisors with job classification guidance. It participates in pay plan or benefits discussions but does not lead either area. Involvement in vendor coordination or union costing is emerging.

3 – Moderate Responsibility

HR maintains the classification and pay plan internally and coordinates with vendors or brokers on benefit programs. It prepares pay adjustments, monitors benefit plan performance, and conducts equity checks, but relies on external consultants for market studies or major redesigns.

3.5 – Moderately High Responsibility

HR manages the full benefits lifecycle (enrollment, compliance, vendor relations) and maintains the classification/pay system in-house. It models costs for bargaining, participates in market studies, and provides integrated recommendations on both benefits and compensation adjustments.

4 – High Responsibility

HR leads both benefits strategy (including vendor negotiations, plan design, and wellness programs) and compensation system maintenance. It conducts internal pay equity reviews, keeps classification systems current without outside reliance, and prepares detailed costing for bargaining and budgeting.

4.5 – Very High Responsibility

HR acts as plan administrator for all benefit programs and drives pay structure design. It develops/updates classification systems, conducts market studies internally, manages vendor negotiations, and integrates benefits and compensation strategies into workforce planning.

5 – Full Total Rewards Ownership

HR is the architect of the organization's entire total rewards approach—designing and administering benefit plans (self-funded or fully insured), creating and maintaining pay structures, conducting classification audits,

leading market studies, and linking both comp and benefits strategies directly to retention, recruitment, and budget sustainability.

Culture & Engagement Leadership (CE) – Scoring Scale

1 – No Active Role

HR has no responsibility for employee engagement, retention, or cultural initiatives. Onboarding is inconsistent and handled separately by each department. No formal surveys, stay interviews, or feedback loops exist. Morale, fairness, and workplace climate are addressed informally, if at all, by individual supervisors or elected officials.

1.5 – Near-Zero Role

HR distributes basic onboarding materials and occasionally addresses morale concerns brought forward by employees or supervisors. Recognition, survey, or communication efforts are ad hoc, sporadic, and typically initiated by departments, unions, or elected officials without HR leadership.

2 – Limited Role

HR coordinates basic onboarding processes and handles employee concerns informally. It may assist departments with recognition events, wellness activities, or occasional stay/exit interviews. Engagement efforts are small-scale and not systematically connected to organizational strategy.

2.5 – Low-to-Moderate Role

HR supports scattered or pilot engagement efforts—such as onboarding check-ins, limited climate survey use, or targeted retention projects in specific departments. It tracks recurring themes from complaints or exits but lacks the time, authority, or mandate to act systematically on the findings.

3 – Moderate Role

HR leads organization-wide onboarding and conducts climate surveys, exit interviews, or stay interviews at least annually. It provides informal action plans in response to identified morale issues and advises leadership on patterns related to trust, fairness, or communication gaps.

3.5 – Moderately High Role

HR runs structured engagement programs, including organization-wide surveys, recognition initiatives, and enhanced onboarding experiences. It partners with departments to address turnover or morale issues and collaborates on fairness, inclusion, and belonging initiatives.

4 – High Role

HR is recognized as the steward of the employee experience. It develops data-driven engagement strategies, analyzes climate, retention, and exit trends, and leads cross-departmental culture-building initiatives aligned with organizational values. Programs include retention strategies and internal career mobility pathways.

4.5 – Very High Role

HR partners with leadership—administrators, elected officials, and department heads—on strategic workforce culture priorities. It presents engagement data to boards or executives, builds accountability for department-level morale and engagement, and integrates onboarding, fairness, and communication practices into organizational policy and supervisory expectations.

5 – Full Engagement Leadership

HR leads the organization's people strategy—designing, measuring, and evolving the employee experience. It operates a continuous feedback cycle (onboarding, pulse surveys, climate reviews), directly links engagement

data to retention and trust-building, and drives culture outcomes that shape leadership decisions at the highest levels.

Technology & Analytics Leverage (TL) Offset – Scoring Scale

1 – Minimal Leverage

HR relies almost entirely on paper forms, spreadsheets, and email for core functions. No integrated HRIS exists; employee data is stored manually. Reports are created only when requested and contain limited analysis. Technology plays little role in shaping HR decisions.

1.5 – Near-Minimal Leverage

Some isolated tasks are digital—such as electronic payroll submission to a state system—but onboarding, leave tracking, and recruitment remain largely paper-based. Reports can be generated but require manual assembly, limiting their frequency and usefulness.

2 – Basic Leverage

A basic HRIS or payroll platform is in place, often inherited from a finance or state system. Some modules (e.g., timekeeping, benefits) are functional but underused. Limited employee self-service is available. Reporting is possible but used mainly for compliance filings, not proactive decision-making.

2.5 – Early Adoption

HR uses a mix of manual processes and standalone digital tools (e.g., online applicant tracking, digital onboarding forms). Managers have partial self-service access. Reports are pulled to track trends but are rarely applied to strategic or process improvement work.

3 – Moderate Leverage

Most core HR functions—recruiting, benefits, payroll coordination, personnel records—are processed through one or more integrated systems. Employees and supervisors use self-service for basic updates. HR generates reports for headcount, turnover, and compliance, and occasionally applies analytics in workforce planning or presentations.

3.5 – Moderately High Leverage

Automation is common, and multiple HR functions are interconnected. Dashboards display vacancy trends, time-to-hire metrics, and training completions. HR shares reports with department heads and leadership. Data are increasingly used to guide decisions, though interpretation often relies on HR staff expertise.

4 – High Leverage

The HRIS is fully integrated with payroll, benefits, recruiting, and timekeeping. Self-service is the norm for most employees and supervisors. Routine tasks are automated, freeing HR staff for strategic work. Analytics are actively used to forecast retirements, monitor hiring pipelines, and support policy or pay planning.

4.5 – Very High Leverage

Real-time dashboards and workflow automation are embedded into daily operations. HR shares data cross-functionally with Finance, Administration, and other departments. System-generated insights influence staffing strategies and policy updates. Staff across the organization require basic data fluency to engage with HR processes.

5 – Transformational Leverage

HR operates as a fully data-informed function. Systems produce predictive analytics, benchmark comparisons, and scenario modeling. Generative AI or advanced business intelligence tools assist in analysis,

communication, and policy design. Leadership relies on HR's analytics to shape organizational strategy, and manual processes are virtually eliminated.

Shared-Services & Outsourcing Offset (SSO) – Scoring Scale

1 – No Offset

All HR-assigned functions—such as payroll, benefits, recruiting, labor relations, compliance, FMLA/leave administration, and any safety/risk duties—are performed entirely in-house by HR staff. No services are shared with other entities or reassigned internally. All operational and strategic workload rests on HR's internal capacity.

1.5 – Minimal Offset

Only limited, occasional external support exists (e.g., benefits broker assistance, legal review, temporary recruiting help). HR still performs nearly all operational work, including payroll data entry (if in scope), FMLA tracking, recruiting, compliance, and any safety/risk tasks. Vendor or partner involvement does not materially reduce workload.

2 – Limited Offset

Some functions—such as FMLA administration, COBRA processing, or certain risk management tasks—are handled externally or by another department, but HR retains most day-to-day responsibilities. Vendor or partner arrangements still require HR oversight and frequent follow-up. Workload relief is modest.

2.5 – Partial Offset

Several high-volume administrative functions—such as payroll processing (if in HR's scope), applicant screening, workers' comp claims, FMLA administration, or benefits enrollment—are consistently handled by external vendors, TPAs, or shared-service units. HR focuses on oversight, compliance, and issue resolution, resulting in moderate internal workload reduction.

3 – Moderate Offset

HR operates in a hybrid model where multiple core functions—such as benefits administration, payroll execution, FMLA leave tracking, and certain safety/risk duties—are performed externally or centrally through shared services. Internal HR staff focus on coordination, compliance, and vendor management. Transactional workload is significantly reduced.

3.5 – High Offset

Most transactional HR work is outsourced or centrally provided, including payroll (if in scope), benefits processing, FMLA administration, timekeeping support, workers' comp case management, and early-stage recruiting. HR's role centers on policy, vendor liaison, and escalated issue handling. Several internal FTE positions are avoided or redeployed.

4 – Very High Offset

HR functions primarily as a policy and strategy advisor. Service delivery—across payroll, benefits, recruiting, FMLA administration, and any safety/risk duties—is almost entirely external or shared. Internal workload is limited to contract oversight, high-level compliance, and strategic HR initiatives.

4.5 – Near-Full Offset

HR's operational footprint is minimal. Nearly all HR-related processes are handled externally or through robust shared-service agreements (e.g., regional HR consortia, county-provided payroll and benefits administration). HR's role is largely relationship management and compliance stewardship.

5 – Full Offset

All HR-assigned functions—payroll, benefits, recruiting, labor relations, compliance, FMLA/leave administration, and any safety/risk duties—are fully delivered by external providers or shared-service entities. HR staffing is limited to oversight, performance monitoring, and strategic advisory functions.