



2009 Saratoga Canada Metric List

Updated: January 31, 2009

Metric	Formula	Description
Organization and Operations		
1. Human Capital ROI	$\text{Revenue} - (\text{Operating Cost} - \text{Labour Cost}) / \text{Labour Cost}$	Pre-tax profit for each dollar invested in pay and benefits.
2. Revenue per FTE	$\text{Revenue} / \text{FTE}$	Revenue generated for each full-time equivalent employee.
3. Operating Cost per FTE	$\text{Operating Cost} / \text{FTE}$	Operating cost for each full-time equivalent employee.
4. Profit per FTE	$(\text{Revenue} - \text{Operating Cost}) / \text{FTE}$	Profit for each full-time equivalent employee.
5. Workforce Size Growth Rate ⁺	$(\text{End of Period Headcount} - \text{Adjusted Beginning Headcount}) / \text{Adjusted Beginning Headcount}$	Percent annual growth rate in workforce size.
6. Part-Time Percent	$\text{Part-Time Headcount} / \text{Headcount}$	Percent of employees who are part-time.
7. Executive Percent ⁺ (New 2009!)	$\text{Executive Headcount} / \text{Headcount}$	Percent of employees who are executives.
8. Manager Percent ⁺ (New 2009!)	$\text{Manager Headcount} / \text{Headcount}$	Percent of employees who are managers.
9. Non-Management Percent ⁺ (New 2009!)	$\text{Non-Management Headcount} / \text{Headcount}$	Percent of employees who are non-management.
10. Female Percent	$\text{Female Headcount} / \text{Headcount}$	Percent of employees who are female.
11. Female Executive Percent ⁺	$\text{Female Executive Headcount} / \text{Executive Headcount}$	Percent of executives who are female.
12. Baby Boomer Percent	$\text{Headcount of Employees Born Between 1943 and 1960} / \text{Headcount}$	Percent of employees who are part of the Baby Boomer generation.
13. Generation X Percent	$\text{Headcount of Employees Born Between 1961 and 1981} / \text{Headcount}$	Percent of employees who are part of Generation X.

⁺ International benchmark data may not be available

Metric	Formula	Description
Organization and Operations Continued		
14. Generation Y Percent	Headcount of Employees Born In or After 1982 / Headcount	Percent of employees who are part of Generation Y.
15. Under Age 25 Percent ⁺	Headcount of Employees Less Than 25 Years of Age / Headcount	Percent of employees who are less than 25 years of age.
16. Ages 25-29 Percent ⁺	Headcount of Employees Aged 25 to 29 / Headcount	Percent of employees who are between 25 and 29 years of age.
17. Ages 30-34 Percent ⁺	Headcount of Employees Aged 30 to 34 / Headcount	Percent of employees who are between 30 and 34 years of age.
18. Ages 35-39 Percent ⁺	Headcount of Employees Aged 35 to 39 / Headcount	Percent of employees who are between 35 and 39 years of age.
19. Ages 40-44 Percent ⁺	Headcount of Employees Aged 40 to 44 / Headcount	Percent of employees who are between 40 and 44 years of age.
20. Ages 45-49 Percent ⁺	Headcount of Employees Aged 45 to 49 / Headcount	Percent of employees who are between 45 and 49 years of age.
21. Ages 50-54 Percent ⁺	Headcount of Employees Aged 50 to 54 / Headcount	Percent of employees who are between 50 and 54 years of age.
22. Ages 55-59 Percent ⁺	Headcount of Employees Aged 55 to 59 / Headcount	Percent of employees who are between 55 and 59 years of age.
23. Age 60 and Above Percent ⁺	Headcount of Employees 60 Years of Age or Older / Headcount	Percent of employees who are 60 years of age or older.
24. Average Age ⁺	Total Age / Headcount	Average age of the organization's workforce.
25. Average Retirement Age ⁺	Total Retirements Age / Retirements	Average age of employees who retired from the organization.
26. First Year of Service Percent	Headcount with 0 to 1 Year of Service / Headcount	Percent of employees with less than 1 year of service.
27. One to Two Years of Service Percent	Headcount with 1 to 2 Years of Service / Headcount	Percent of employees with 1 to 2 years of service.
28. Two to Three Years of Service Percent	Headcount with 2 to 3 Years of Service / Headcount	Percent of employees with 2 to 3 years of service.
29. Three to Five Years of Service Percent	Headcount with 3 to 5 Years of Service / Headcount	Percent of employees with 3 to 5 years of service.
30. Five to Ten Years of Service Percent	Headcount with 5 to 10 Years of Service / Headcount	Percent of employees with 5 to 10 years of service.
31. More than Ten Years of Service Percent	Headcount with More Than 10 Years of Service / Headcount	Percent of employees with more than 10 years of service.
32. Ten to Twenty Years of Service Percent ⁺ (New 2009!)	Headcount with 10 to 20 Years of Service / Headcount	Percent of employees with 10 to 20 years of service.

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Metric	Formula	Description
Organization and Operations Continued		
33. More than Twenty Years of Service Percent ⁺ (New 2009!)	Headcount With More than 20 Years of Service / Headcount	Percent of employees with more than 20 years of service.
34. Average Tenure	Total Tenure / Headcount	Average years of service across all employees in the organization.
35. Average Retirement Tenure ⁺	Total Retirements Tenure / Retirements	Average years of service of all employees who retired.
36. Rookie Ratio	(Headcount with 0 to 1 Year of Service + Headcount with 1 to 2 Years of Service) / Headcount	Percent of employees with less than 2 years of service.
37. Percent of Employees Eligible for Retirement Within Next 5 Years	Employees Eligible for Retirement Within Next 5 Years / Headcount	Percent of employees eligible for retirement within the next 5 years.
38. Percent of Executives Eligible for Retirement Within Next 5 Years (New 2009!)	Executives Eligible for Retirement Within Next 5 Years / Executive Headcount	Percent of executives eligible for retirement within the next 5 years.
39. Percent of Managers Eligible for Retirement Within Next 5 Years (New 2009!)	Managers Eligible for Retirement Within Next 5 Years / Manager Headcount	Percent of managers eligible for retirement within the next 5 years.
40. Percent of Non-Management Employees Eligible for Retirement Within Next 5 Years ⁺ (New 2009!)	[Employees Eligible for Retirement Within Next 5 Years – (Executives Eligible for Retirement Within Next 5 Years + Managers Eligible for Retirement Within Next 5 Years)] / Non-Management Headcount	Percent of non-management employees eligible for retirement within the next 5 years.
41. Executive Span of Control	Headcount / Executive Headcount	Number of employees supported by each executive.
42. Executive Stability Ratio (New 2009!)	Executives With 3 or More Years of Service / Executive Headcount	Percent of executives with 3 or more years of service.
43. Management Span of Control	Headcount / Management Headcount	Number of employees supported by each manager or above.
44. Percent of Management with No Direct Reports (New 2009!)	(Executives with No Direct Reports + Managers with No Direct Reports) / Management Headcount	Percent of executives and managers having no direct reports.
45. Executive Succession Pipeline Depth ⁺	Number of Succession Planning Candidates / Executive Headcount	Average number of succession planning candidates for each executive.
46. Promotion Rate	Promotions / Headcount	Percent of headcount who were promoted.
47. Baby Boomer Promotion Rate ⁺ (New 2009!)	Promotions of Employees Born Between 1943 and 1960 / Headcount of Employees Born Between 1943 and 1960	Baby Boomer promotions as a percent of Baby Boomer headcount.
48. Generation X Promotion Rate ⁺ (New 2009!)	Promotions of Employees Born Between 1961 and 1981 / Headcount of Employees Born Between 1961 and 1981	Generation X promotions as a percent of Generation X headcount.

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Metric	Formula	Description
Organization and Operations Continued		
49. Generation Y Promotion Rate ⁺ (New 2009!)	Promotions of Employees Born In or After 1982 / Headcount of Employees Born In or After 1982	Generation Y promotions as a percent of Generation Y headcount
50. Transfer Rate	Transfers / Headcount	Percent of headcount who were transferred.
51. Career Path Ratio	Promotions / (Promotions + Transfers)	Percent of employee movement that is upward.
HR Staff and Structure		
52. HR Headcount Ratio	Headcount / HR Headcount	Number of employees each HR employee supports.
53. HR FTE Ratio	FTE / HR FTE	Number of full-time equivalents each HR FTE supports.
54. HR Executive Span of Control ⁺	HR Headcount / HR Executive Headcount	Number of HR employees each HR Executive supports.
55. HR Costs per Employee	HR Costs / Headcount	Amount directly invested in the HR department for each employee.
56. HR Costs per FTE	HR Costs / FTE	Amount directly invested in the HR department for each full-time equivalent.
57. HR Costs / Revenue	HR Costs / Revenue	Percent of revenue devoted to HR costs.
58. HR Costs / Operating Cost	HR Costs / Operating Cost	Percent of operating costs devoted to HR costs.
59. Learning & Development Headcount Ratio	Headcount / Learning & Development Headcount	Number of employees each L&D employee supports.
60. Learning & Development FTE Ratio	FTE / Learning & Development FTE	Number of full-time equivalents each L&D FTE supports.
61. Learning & Development Investment per FTE	Total Learning & Development Cost / FTE	Amount invested directly in employee L&D for each full-time equivalent.
62. Learning & Development Hours per FTE	Total Learning & Development Hours / FTE	Number of L&D hours per full-time equivalent.
Compensation and Benefits		
63. Labour Cost Revenue Percent	Labour Cost / Revenue	Compensation and benefit costs as a percent of revenue.
64. Labour Cost Expense Percent	Labour Cost / Operating Cost	Percent of operating cost devoted to compensation and benefit costs.

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Metric	Formula	Description
Compensation and Benefits		
65. Labour Cost per FTE	Labour Cost / FTE	Average compensation and benefits per full-time equivalent.
66. Sick Days per FTE	Sick Days / FTE	Average number of workdays employees missed due to illness.
67. Percent of Employees Awarded Long-Term Incentives ⁺	Employees Awarded Long-Term Incentives / Headcount	Percent of employees awarded a long-term incentive.
Hiring and Staffing		
68. External Recruitment Percent ⁺ (New 2009!)	External Recruits / Job Requisitions Filled	Percent of job requisitions filled by external recruits.
69. External Recruitment Rate	External Recruits / Headcount	External recruits as a percent of employee headcount.
70. Baby Boomer External Recruitment Rate	External Recruits Born Between 1943 and 1960 / Headcount of Employees Born Between 1943 and 1960	Baby Boomer external recruits as a percent of Baby Boomer headcount.
71. Generation X External Recruitment Rate	External Recruits Born Between 1961 and 1981 / Headcount of Employees Born Between 1961 and 1981	Generation X external recruits as a percent of Generation X headcount.
72. Generation Y External Recruitment Rate	External Recruits Born In or After 1982 / Headcount of Employees Born In or After 1982	Generation Y external recruits as a percent of Generation Y headcount.
73. Rehire Percent	External Rehires / External Recruits	Percent of external recruits who are rehires.
74. 90 Day Turnover Rate	Turnover with 0 to 3 Months of Service / External Recruits	Percent of external recruits who separated during their first 3 months.
75. Net Hire Ratio ⁺	External Recruits / (Resignations + Retirements + Involuntary Separations)	Number of external recruits for every voluntary or involuntary separation.
76. External Time to Fill	External Days to Fill / External Recruits	Average number of days from job requisition approval to offer acceptance for external recruits.
77. External Cost per Hire	External Recruiting Costs / External Recruits	Average cost to hire external employees.
78. Internal Movement Percent ⁺ (New 2009!)	(Promotions + Transfers) / Headcount	Percent of headcount promoted or transferred.

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Metric	Formula	Description
Retention and Separations		
79. Retention Rate ⁺	End of Period Headcount / (Adjusted Beginning Headcount + External Recruits)	Percent of employees who remained with the organization.
80. Resignation Rate	Resignations / Headcount	Percent of employees who resigned.
81. First Year of Service Resignation Rate	Resignations with 0 to 1 Year of Service / Headcount with 0 to 1 Year of Service	Percent of headcount with less than 1 year of service who resigned.
82. One to Two Years of Service Resignation Rate	Resignations with 1 to 2 Years of Service / Headcount with 1 to 2 Years of Service	Percent of headcount with 1 to 2 years of service who resigned.
83. First Two Years of Service Resignation Rate ⁺	(Resignations with 0 to 1 Year of Service + Resignations with 1 to 2 Years of Service) / (Headcount with 0 to 1 Year of Service + Headcount with 1 to 2 Years of Service)	Percent of headcount with less than 2 years of service who resigned.
84. Two to Three Years of Service Resignation Rate	Resignations with 2 to 3 Years of Service / Headcount with 2 to 3 Years of Service	Percent of headcount with 2 to 3 years of service who resigned.
85. Three to Five Years of Service Resignation Rate	Resignations with 3 to 5 Years of Service / Headcount with 3 to 5 Years of Service	Percent of headcount with 3 to 5 years of service who resigned.
86. Five to Ten Years of Service Resignation Rate	Resignations with 5 to 10 Years of Service / Headcount with 5 to 10 Years of Service	Percent of headcount with 5 to 10 years of service who resigned.
87. More than Ten Years of Service Resignation Rate	Resignations with More than 10 Years of Service / Headcount with More than 10 Years of Service	Percent of headcount with more than 10 years of service who resigned.
88. Ten to Twenty Years of Service Resignation Rate ⁺ (New 2009!)	Resignations with 10 to 20 Years of Service / Headcount with 10 to 20 Years of Service	Percent of headcount with 10 to 20 years of service who resigned.
89. More than Twenty Years of Service Resignation Rate ⁺ (New 2009!)	Resignations with More than 20 Years of Service / Headcount with More than 20 Years of Service	Percent of headcount with more than 20 years of service who resigned.
90. Retirement Rate ⁺	Retirements / Headcount	Percent of employees who retired.
91. Organizational Knowledge Loss Percent ⁺	Total Retirements Tenure / (Total Tenure + Total Retirements Tenure)	Percent of total tenure in the organization leaving through retirement during the survey period.
92. Potential Organizational Knowledge Loss Percent Over Next 5 Years ⁺ (New 2009!)	[Total Tenure of Employees Eligible to Retire Over Next 5 Years + (Employees Eligible to Retire Over Next 5 Years * 2.5)] / [Total Tenure + (Headcount * 2.5)]	Percent of total tenure in the organization potentially lost through retirement over the next 5 years.

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Metric	Formula	Description
Retention and Separations Continued		
93. Voluntary Separation Rate	$(\text{Resignations} + \text{Retirements}) / \text{Headcount}$	Percent of employees who resigned or retired.
94. Baby Boomer Voluntary Separation Rate	$\text{Voluntary Separations of Employees Born Between 1943 and 1960} / \text{Headcount of Employees Born Between 1943 and 1960}$	Percent of Baby Boomer employees who voluntarily left the organization.
95. Generation X Voluntary Separation Rate	$\text{Voluntary Separations of Employees Born Between 1961 and 1981} / \text{Headcount of Employees Born Between 1961 and 1981}$	Percent of Generation X employees who voluntarily left the organization.
96. Generation Y Voluntary Separation Rate	$\text{Voluntary Separations of Employees Born In or After 1982} / \text{Headcount of Employees Born In or After 1982}$	Percent of Generation Y employees who voluntarily left the organization.
97. Cost of Voluntary Turnover	$\text{Cost of Voluntary Turnover} / (\text{Resignations} + \text{Retirements})$	Average cost to replace each voluntary separation.
98. Voluntary Turnover Cost as a Percentage of Profit	$\text{Cost of Voluntary Turnover} / (\text{Revenue} - \text{Operating Cost})$	Average voluntary turnover cost as a percent of profit.
99. Involuntary Separation Rate	$\text{Involuntary Separations} / \text{Headcount}$	Percent of employees who separated due to dismissal, lay-off, or death.
100. Turnover Rate	$(\text{Resignations} + \text{Retirements} + \text{Involuntary Separations}) / \text{Headcount}$	Percent of employees who voluntarily or involuntarily left the organization.
101. High Performer Separation Rate	$\text{High Performer Turnover} / \text{High Performer Headcount}$	Percent of high performer employees who left the organization.

† International benchmark data may not be available

2009 Data Element List

A) Organization and Operations

1. Revenue
2. Operating Cost
3. FTE
4. Headcount
5. Adjusted Beginning Headcount
6. End of Period Headcount
7. Female Headcount
8. Part-Time Headcount
9. Headcount by Role:
Executives, Managers (**New 2009**), Management, Non-Management (**New 2009**)
10. Executives with 3 or More Years of Service (**New 2009**)
11. No Direct Reports by Role (**New 2009**):
Executives, Managers
12. Female Executive Headcount
13. Headcount by Age Band:
Under 25, 25-29, 30-34, 35-39, 40-44, 45-49, 50-54, 55-59, 60+
14. Headcount by Generation:
Birth Years 1943 – 1960, Birth Years 1961 – 1981, Birth Years In or After 1982
15. Headcount by Tenure Band:
Less than 1 Year, 1 to 2 Years, 2 to 3 Years, 3 to 5 Years, 5 to 10 Years, 10 to 20 Years (**New 2009**), More than 20 Years (**New 2009**)
16. High Performer Headcount
17. Retirement Eligibility Over Next 5 Years:
Executives (**New 2009**), Managers (**New 2009**), Employees
18. Number of Succession Planning Candidates
19. Promotions
20. Promotions by Generation (**New 2009**):
Birth Years 1943 – 1960, Birth Years 1961 – 1981, Birth Years In or After 1982
21. Transfers
22. Total Age
23. Total Retirements Age

B) HR Staff and Structure

1. HR Headcount
2. HR Executive Headcount
3. HR FTE
4. HR Costs
5. Learning & Development Headcount
6. Learning & Development FTE
7. Total Learning & Development Cost
8. Total Learning & Development Hours

C) Compensation and Benefits

1. Labour Cost
2. Sick Days
3. Employees Awarded Long-Term Incentives

D) Hiring & Staffing

1. External Recruits
2. External Recruits by Generation:
Birth Years 1943 – 1960, Birth Years 1961 – 1981, Birth Years In or After 1982
3. External Rehires
4. External Days to Fill
5. External Recruiting Costs
6. Job Requisitions Filled (**New 2009**)

E) Retention and Separations

1. Resignations
2. Resignations by Tenure Band:
Less than 1 Year, 1 to 2 Years, 2 to 3 Years, 3 to 5 Years, 5 to 10 Years, 10 to 20 Years (**New 2009**), More than 20 Years (**New 2009**)
3. Retirements
4. Voluntary Separations by Generation:
Birth Years 1943 – 1960, Birth Years 1961 – 1981, Birth Years In or After 1982
5. Involuntary Separations
6. Turnover with 0 to 3 Months of Service
7. High Performer Turnover

A) Organization and Operations (Con't)

24. Total Tenure

25. Total Retirements Tenure

26. Total Tenure of Employees Eligible to Retire
Over Next 5 Years **(New 2009)**

E) Retention and Separations (Con't)

8. Cost of Voluntary Turnover