

## HR Readiness Checklist

### Is It Time to Take a Closer Look at How HR Is Working in Your Organization?

An **HR Assessment** looks at how HR systems, processes, and responsibilities function day-to-day, not just whether policies exist. This checklist can help determine whether your current approach is supporting your people, mission, and growth. Check the statements that are true.

#### HR Foundations & Compliance

- Employee handbook has been updated within the last 12-18 months
- Worker classifications have been reviewed
- Employee records are complete and consistent
- HR lifecycle follows a consistent process (e.g. onboarding, offboarding, performance reviews)

#### Payroll, Benefits & Core HR Systems

- Payroll runs accurately with minimal corrections
- Benefits are clearly communicated to employees
- Data entry is accurate and does not rely on manual workarounds

#### Roles, Structure & Documentation

- Job descriptions and reporting lines are clear
- Compensation practices are consistent, transparent and accurately benchmarked

#### HR Ownership & Team Structure

- HR responsibilities are clearly owned
- Managers know when to escalate HR issues
- External partners are used intentionally
- HR knowledge is not concentrated in one person

#### Manager & Employee Experience

- Managers understand their people responsibilities
- Performance expectations are applied consistently
- Employees know where to go with HR questions
- Concerns are handled consistently and documented

#### Growth, Risk & Sustainability

- HR systems can support growth or change
- Compliance risks are visible to leadership
- HR knowledge is not dependent on one person
- HR practices align with organizational values

#### HR Readiness Scorecard

- **0-8 checks** -> high risk, reactive stage
- **9-16 checks** -> functional, but uneven
- **17-22 checks** -> well positioned

**Note:** Repeated employee complaints or leadership concerns may warrant an HR Assessment regardless of the score.