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## Tool 2 – Designing and Analyzing Turnover Data Reports

### This Tool Includes

- Explanations on how turnover data reports can assist you in reducing employee turnover.
- Guidelines for designing turnover reports.
- Sample turnover data reports.

### How Turnover Reports Can Help

Having good turnover data at your disposal is an invaluable planning tool. So often the reports we rely on just don't tell us what we need to know in a simple, straightforward manner. Worse yet, in many human services agencies, turnover reports don't exist at all.

Turnover reports can provide very important information about what's going on in your agency. Having good turnover data can help you:

- Understand the magnitude of your turnover problem – or whether you even have one.
- Analyze the causes of turnover in your agency

- Determine the impact of any steps you take to address turnover and retention issues.
- Provide responses to inquiries from various constituencies including legislators, commissioners, boards of directors and the media.

The sample reports we show will not provide you with all the answers as to why your agency has high turnover rates, but they can help you frame the questions.

We understand that the reports outlined in this Tool are sophisticated and that your agency may not have the capacity to obtain the data and develop similar reports. However, any turnover data you have is useful.

Start with the basic demographic data you have and build more sophisticated reports over time. For example, you might begin by selecting one position where you have the most concerns about turnover and tracking that position for a year.

### Defining Turnover

We define turnover here as the number of people leaving an agency or category during a specific time period (usually one year) divided by the average number of employees in that agency or category during the same time period.

$$\text{Turnover} = \frac{\text{No. people leaving (1 year)}}{\text{Average No. Employees (same year)}}$$

Turnover can be measured at many levels. You can measure the number of employees leaving an agency, a department or division, a classification, or a single position. Regardless at what level you apply the definition, the basic calculation remains the same.

### Sample Reports and Guidelines

Each of the following sample report formats includes a brief description of what it measures and how it might be used. All of the sample reports are designed:

- To measure departure data from one pay period to another, cumulating the data for “year-to-date” reporting.
- For a hypothetical large, statewide human services agency providing child welfare services in multiple locations.
- To track turnover within the hypothetical Children’s Services Specialist (CSS) classification, (the classification for all child welfare workers) and major groupings of similar, specialized jobs within the classification (such as Protective Services [PS], Foster Care and Adoption).

- As a series of reports, which when analyzed together, provide a complete picture of an agency’s turnover.

## Turnover Report by Reason for Departure within Program

### Protective Services Program, Protective Services Workers

Date: January 7, 2005

Reason for Departure		Resigned		Moved to New Department		Retirement		Layoff (R.I.F. or Seasonal)		Medical Layoff		Discharge		Expired Appointment		Death		W.R.L.O.A.		Total	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Separations	Pay Period 26	3	50.0%	1	16.6%	1	16.6%	0	0.0%	0	0.0%	1	16.6%	0	0.0%	0	0.0%	0	0.0%	6	100%
	Year-to-Date	169	73.4%	15	6.5%	23	10.0%	0	0.0%	11	4.7%	7	3.0%	0	0.0%	1	0.4%	4	1.7%	230	100%

Reason for Departure		Lateral Transfer (Different Class)		Promotion		Demotion		Total	
		No.	%	No.	%	No.	%	No.	%
Left Classification	Pay Period 26	1	50.0%	0	0.0%	1	50.0%	2	100.0%
	Year-to-Date	11	57.9%	2	10.5%	6	31.5%	19	100.0%

Reason for Departure		To Foster Care		To Adoption		To J.J.		Total	
		No.	%	No.	%	No.	%	No.	%
Left Program	Pay Period 26	0	0.0%	1	100.0%	0	0.0%	1	100.0%
	Year-to-Date	27	45.7%	13	22.0%	19	32.2%	59	100.0%

Reason for Departure		Separated		Left Classification		Left Program		Total	
		No.	%	No.	%	No.	%	No.	%
Total Departed	Pay Period 26	6	66.6%	2	22.2%	1	11.1%	9	100.0%
	Year-to-Date	230	74.7%	19	6.2%	59	19.2%	308	100%

This report tracks departures from a specialized job (Protective Services Worker) within the larger Children's Services Specialist (CSS) classification.

In this Department, there are three basic "Reasons for Departure" from the Protective Services Worker job:

- Separation from the Department.
- Leaving the CSS classification, although staying in the Department.
- Leaving the Protective Services Worker, although staying in the CSS classification.

The specific reasons for "Separation" are identified here as "Resigned," "Moved to New Department," "Retirement," etc. Reasons for separations in your agency may be different. "Moved to New Department" is a "Separation" reason in this report because it is designed from the departmental perspective.

The specific reasons for "Left Classification" are identified as "Lateral Transfer to a Different Classification," "Promotion" and "Demotion."

The reasons for "Left Program" identify the specific programs – or specialized jobs – to which a PS Worker could transfer such as Foster Care, Adoption or Juvenile Justice. This section of the report tracks the number of CSSs who left the Protective Services Program (or the PS Worker Job) and became a Foster Care Worker, Adoption Worker or a Juvenile Justice Worker. (Employees transferring to another office but remaining a PS Worker are not counted in this report.)

This report provides sufficient detail to allow you to monitor in each pay period how many of your PS Workers left the agency due to resignation, retirement, transfer to another state agency, etc. You can also determine how many were promoted or demoted or laterally transferred.

## Employee Turnover Report By Program

Date: January 7, 2005

Classification	Pay Period	Dates	No. Employs on Payroll	Separations	Percent Separated (Pay Period)	Percent Separated (Proj. Annual)	Left Class (Promote, Demote, Lateral)	Separations + Left Classification	Percent (Pay Period)	Percent (Proj. Annual)	Left Program	Separations + Left Class + Left Program	Percent (Pay Period)	Percent Leaving Program (Proj. Annual)
Foster Care	1	12/7/03-12/20/03	861	2	0.23%	6.04%	1	3	0.35%	9.06%	3	6	0.70%	18.12%
	2	12/21/03-1/3/04	855	1	0.12%	4.55%	3	4	0.47%	10.66%	5	9	1.05%	22.75%
	26	12/12/04-12/25/04	866	3	0.35%	17.56%	2	5	0.58%	18.59%	2	7	0.81%	19.62%
Protective Services	1	12/7/03-12/20/03	717	5	0.70%	18.13%	1	6	0.84%	21.76%	4	10	1.39%	36.26%
	2	12/21/03-1/3/04	711	4	0.56%	16.38%	0	4	0.56%	18.20%	1	5	0.70%	27.17%
	26	12/12/04-12/25/04	726	6	0.83%	32.72%	2	8	1.10%	34.66%	1	9	1.24%	42.86%
Adoption	1	12/7/03-12/20/03	92	1	1.09%	28.26%	0	1	1.09%	28.26%	0	1	1.09%	28.26%
	2	12/21/03-1/3/04	92	0	0.00%	14.17%	0	0	0.00%	14.17%	0	0	0.00%	14.17%
	26	12/12/04-12/25/04	90	1	1.11%	6.44%	0	1	1.11%	7.14%	0	1	1.11%	7.69%
Juvenile Justice	1	12/7/03-12/20/03	227	0	0.00%	0.00%	0	0	0.00%	0.00%	0	0	0.00%	0.00%
	2	12/21/03-1/3/04	227	0	0.00%	0.00%	0	0	0.00%	0.00%	0	0	0.00%	0.00%
	26	1/4/04-1/17/04	227	0	0.00%	8.61%	0	0	0.00%	9.22%	0	0	0.00%	9.22%
Total Children's Services	1	12/7/03-12/20/03	1897	8	0.42%	10.96%	2	10	0.53%	13.71%	7	17	0.90%	23.30%
	2	12/21/03-1/3/04	1885	5	0.27%	6.90%	3	8	0.42%	11.03%	6	14	0.74%	19.31%
	26	12/12/04-12/25/04	1909	10	0.52%	24.32%	4	14	0.73%	26.76%	3	17	0.89%	30.52%

This report displays data for the agency's four specialized jobs within the Children's Services Specialist (CSS) classification. Turnover data is summarized at the bottom of the report for everyone in the classification. The report reflects separations – those employees who left the classification or left the program – for each program, and a total turnover calculation for the agency per pay period. The report shows data from pay periods 1 and 2, and then skips to pay period 26, to illustrate the year-to-date totals.

Based on tracking turnover for 26 pay periods, we find that:

- The turnover rate for all of children's services is 24.32%, if you define turnover as the number of CSSs who left the agency as a percentage of the average number of CSSs who were on the payroll during the 26 pay periods.
- If, instead, you define the turnover rate as the number of CSSs who left their job, the rate is 26.76%. This definition truly reflects the replacement rate, combining those who left the agency with those staying but taking a promotion, demotion, or another job at the same classification level.
- If you add the number of employees who moved from one program to another, the turnover rate jumps up to 30.5%.
- The turnover rate of Protective Services workers leaving the agency is twice as high (42.86%) as for Foster Care workers (19.62%) and more than four times the rate for Adoption (7.69%) and Juvenile Justice workers (9.22%).

Data from this report will help you frame the questions to determine the underlying causes of the turnover rates: What are the issues? Is it the nature of the job? The stress of the workload? The quality of the supervision? The volume of the paperwork?

## Employee Turnover Report by Length of Service within Program

### Protective Services Program, Protective Services Worker

Date: January 7, 2005

Length of Service		0 - 6 months		6 months - 1 year		1 - 2 years		2 - 3 years		3 - 5 years		5 - 7 years		7 - 10 years		10 + years		Total		
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	
Separations	Pay Period																			
	Year-to-Date	55	23.9%	62	26.9%	37	16.1%	21	9.1%	22	9.6%	14	6.1%	12	5.2%	7	3.0%	230	100.0%	

Left Classification	Pay Period																			
	Year-to-Date	1	5.3%	3	15.8%	2	10.5%	2	10.5%	4	21.1%	3	15.8%	4	21.1%	0	0.0%	19	100.0%	

Left Program	Pay Period																			
	Year-to-Date	0	0.0%	1	0.0%	6	10.2%	12	20.4%	20	33.9%	10	16.9%	7	11.9%	3	5.1%	59	100.0%	

Total Departures	Pay Period																			
	Year-to-Date	56	18.2%	66	21.4%	45	14.6%	35	11.4%	46	14.9%	27	8.8%	23	7.5%	10	3.2%	308	100.0%	

Employees on Payroll	Pay Period																			
	Year-to-Date	107	14.9%	126	17.5%	87	12.1%	86	11.9%	84	11.7%	86	11.9%	76	10.6%	68	9.4%	720	100.0%	

Percent Departures		52.3%		52.4%		51.2%		40.1%		54.8%		31.4%		30.1%		14.7%
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The purpose of this report is to help determine the relationship between turnover and length of service. As with the previous reports, this report also allows you to analyze turnover based on departures from the agency, departures from the classification and departures from the Protective Services worker job.

- For "Total Departures," turnover within the first year of employment accounts for almost 40% of the turnover that occurred in the past year (18.2% plus 21.4%).
- More than half (52.3%) of all employees with less than six months of service leave the job.
- Another 52.4% of the employees with between six and twelve months of service also leave.
- For employees with one year or less of service, almost all of them leave the agency.
- As length of service increases, employees are more likely to remain with the agency, but move to different classification or transfer to a different specialty within the CSS classification.

A high percentage of employees leaving during the first year suggests several questions: Are new employees really a good fit for the job? Do the new hires accept the job offer without really understanding what the job is all about? Are the new employees receiving the supervisor support they need to help them through their first several months on the job?

## Employee Turnover Report by Degree within Program

### Protective Services Program, Protective Services Worker

Date: January 7, 2005

Degree		BSW		Criminal Justice		Sociology		Psychology		Other B.A.		MSW		Other M.A.		Total	
		No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Separations	Pay Period																
	Year-to-Date	10	4.3%	23	10.0%	16	6.9%	33	14.3%	99	43.0%	22	9.6%	27	11.7%	230	100.0%
Left Classification	Pay Period																
	Year-to-Date	2	10.5%	4	21.0%	2	10.5%	1	5.3%	4	21.0%	5	26.3%	1	5.3%	19	100.0%
Left Program	Pay Period																
	Year-to-Date	5	8.5%	1	1.7%	5	8.5%	4	6.7%	40	67.8%	2	3.4%	2	3.4%	59	100.0%
Total Departed	Pay Period																
	Year-to-Date	17	5.5%	28	9.3%	23	7.5%	38	12.3%	143	46.4%	29	9.4%	30	9.7%	308	100.0%
Employees on Payroll	Pay Period																
	Year-to-Date	97	13.5%	107	14.8%	40	5.6%	55	7.6%	165	22.9%	206	28.6%	50	6.9%	720	100.0%
Percent			17.5%		26.2%		57.5%		69.1%		86.7%		14.1%		60.0%		

The purpose of this report is to help determine the relationship between turnover and employees' level and type of education.

- "Total Departed" shows the number and percentage of employees who departed the Protective Services job within the past year by degree type.
- Notice the very high proportion of overall turnover by employees in the "Other BA" category -- over 46% of all turnover is among employees in that category.
- The percentage of overall turnover by employees with a BSW (5.5%) or MSW (9.4%) is relatively low.

From this, we can't really tell if the turnover of employees who majored in social work is lower than for employees with other degrees, or if they represent such a small portion of the workforce that their turnover rate appears low. Looking further at the report, we find:

- Of all the employees working in Protective Services during the past year (average of 720), 97 had a BSW (13.5%), and 206 had a MSW (28.6%).
- The lowest turnover rates are among employees with BSWs (17.5 percent) and MSWs (14.1 percent). Compare this to the 86.7% turnover rate among employees in the "Other BA" degree category.
- The turnover rate among Sociology and Psychology majors is also very high, but relatively low for employees with a Criminal Justice degree.

This data suggests several questions: Do the BSW and MSW employees have significantly lower turnover rates because they were more committed to the field of child welfare before taking the job? Has their education better prepared them to cope with the demands of the job? Did the employees with the "Other BA" degrees really know what to expect when they accepted the job offer to work in child welfare?

The highest percentage of employees who "Left Classification" are those with MSWs. Since employees can leave the classification through promotion, demotion or lateral transfer, it would be worthwhile to drill down into the data to determine how many of the MSW employees leaving the classification were actually promoted.

## Employee Turnover Report by Race, Sex within Program

### Protective Services Program, Protective Services Worker

Date: January 7, 2005

Demographic Variable		White				Total White		Black				Total Black		Hispanic				Total Hispanic		Asian				Total Asian		Native American, Eskimo				Total N.A., Eskimo		Gender Totals				Grand Total
		W-M	%	W-F	%	No.	%	B-M	%	B-F	%	No.	%	H-M	%	H-F	%	No.	%	A-M	%	A-F	%	No.	%	NA-M	%	NA-F	%	No.	%	Total Male	%	Total Female	%	
Separations	Pay Period																																			
	Year-to-Date	25	10.9%	94	40.9%	109	47.4%	10	4.3%	42	18.3%	52	22.6%	11	4.8%	33	14.3%	44	19.1%	3	1.3%	7	3.0%	10	4.3%	1	0.4%	4	1.7%	5	2.2%	50	21.7%	180	78.3%	230
Left Classification	Pay Period																																			
	Year-to-Date	3	15.8%	6	31.6%	9	47.4%	2	10.5%	3	15.8%	5	26.3%	2	10.5%	1	5.3%	3	15.8%	0	0.0%	1	5.3%	1	5.3%	0	0.0%	1		1		7	36.8%	12	63.2%	19
Left Program	Pay Period																																			
	Year-to-Date	6	10.2%	24	40.7%	30	50.8%	4	6.8%	10	16.9%	14	23.7%	2	3.4%	8	13.6%	10	16.9%	1	1.7%	4	6.8%	5	8.5%	0	0.0%	0		0		13	22.0%	46	78.0%	59
Total Departed	Pay Period																																			
	Year-to-Date	34	11.0%	124	40.3%	158	51.3%	16	5.2%	55	17.9%	71	23.1%	15	4.9%	42	13.6%	57	18.5%	4	1.3%	12	3.9%	16	5.2%	1	0.3%	5		6		70	22.7%	238	77.3%	308
Employees on Payroll	Pay Period																																			
	Year-to-Date	48	6.7%	262	36.4%	310	43.1%	31	4.3%	207	28.8%	238	33.1%	21	2.9%	90	12.5%	111	15.4%	18	2.5%	30	4.2%	48	6.7%	2	0.3%	11		13		120	16.7%	600	83.3%	720
Percent Departure			70.1%		47.3%		51.0%		51.6%		26.6%		29.8%		71.4%		46.7%		51.4%		22.2%		40.0%		33.3%		50.0%		45.4%	####		58.3%		39.7%		

This report shows turnover by race and sex. The purpose of this type of report is to monitor the turnover of different demographic groups and to determine if any relationships appear to exist between turnover and gender and/or race/ethnicity.

- For "Total Departure," most of the departures (40.3%) are among white females. This is not surprising since they comprise 36.4% of the Protective Services (PS) workforce (see "Employees on Payroll" row).
- The most interesting data is contained in the bottom line of the report. Males have a much higher turnover rate (58.3%) than females (39.7%). White males (70.1%) and Hispanic males (71.4%) have particularly high turnover rates.
- In terms of race and ethnicity, Blacks/African Americans have the lowest turnover (29.8%) while Caucasians/Whites (51%) and Hispanics (51.4%) have the highest turnover. Black females comprise a large percentage of the PS workforce (33.1%) and have a very low turnover rate of 26.6%. White females, on the other hand, comprise 36.4% of the PS workforce and have a turnover rate of 47.3%.

## Employee Turnover Report County Summary

### Children's Services Specialist Classification

Date: January 7, 2005

County	Pay Period	Dates	Payroll	Separations	Percent Separated	Left Class	Percent Left Class	Separations + Left Class	Percent Left Class	Left County	Percent Left County	Seperated + Left Class+ Left County	% Seperated + Left Class + Left County
County A	26	12/12/04-12/25/04	135	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
	Year-to-Date		140	21	15.0%	0	0.0%	21	15.0%	2	1.4%	23	16.4%
County B	26	12/12/04-12/25/04	114	1	0.9%	0	0.0%	1	0.9%	1	0.9%	2	1.8%
	Year-to-Date		120	37	30.8%	1		38	31.7%	9	7.5%	47	39.2%
County C	26	12/12/04-12/25/04	210	2	1.0%	0	0.0%	2	1.0%	0	0.0%	2	1.0%
	Year-to-Date		217	39	18.0%	0		39	18.0%	3	1.4%	42	19.4%
County D	26	12/12/04-12/25/04	188	0	0.0%	0	0.0%	0	0.0%	1	0.5%	1	0.5%
	Year-to-Date		186	65	34.9%	3	1.6%	68	36.6%	16	8.6%	84	45.2%

Totals Shown Below Include Data From Other Counties Omitted because of Space Limitations

Total Children's Services	26	12/12/04-12/25/04	1909	10	0.5%	4	0.2%	14	0.7%	7	0.4%	16	0.8%
	Year-to-Date		1925	404	21.0%	41	2.1%	445	23.1%	125	6.5%	570	29.6%

This report is intended to be monitored centrally to track turnover in the county offices of a statewide organization. It could also be used by a large county, city or private agency with multiple district or branch locations.

The primary purpose of this report is to help determine if turnover rates differ significantly from one county to another. This report does not track transfers from one program to another within the classification.

This report tracks turnover by three different departure definitions:

1. Separations from the agency.
2. Departures the classification (promotion, demotion or lateral transfer to a different classification within the agency).
3. Transfer from one county to another, although remaining in the Children's Services Specialist (CSS) classification.

- For the four counties used in the example, the overall turnover rate ranges from 16.4% in County A to 45.2% in County D.
- Both Counties B and D have a high percentage of employees leaving the agency (30.8% and 34.9%) as well as a relatively large percentage of employees transferring to CSS positions in other counties (7.5% and 8.6%).

The fact that turnover rates in Counties B and D are roughly double those of Counties A and C suggests several questions: Are there problems with the supervisory and management style in offices B and D? Are there some things about the nature of the communities that make the job more difficult – or perhaps a less desirable place for employees to live? Are many of the new hires in Counties B and D residents of neighboring counties where hiring opportunities are more limited?