

HR Board Report Template

Including template & examples

[Insert initiative name]

[Provide a concise overview of this initiative]

Status

[Insert visualization here]

Challenges **Key learnings** **Milestones**

HR Vision: [Insert]

Strategic Initiatives		RAG Status	
Initiative 1		RAG Status	
Initiative 2		RAG Status	
Initiative 3		RAG Status	

Highlights of the period

- [Insert highlights here]

Business Impact Metrics			Risks			
Metrics	Previous period	Current period	Risks	Previous status	Current status	Mitigating actions
Metric 1			Risk 1			
Metric 2			Risk 2			

Focus for coming period

- [Insert here]

...nes that you have
...initiative]

*Effectively communicate HR priorities, impact, and risks to key stakeholders with this **ready-to-use HR board report template!***

In this guide:

- 1** Executive summary *Page 4.*
- 2** Workforce profile *Page 6.*
- 3** Key metrics *Page 7.*
- 4** Strategic initiatives update *Page 8.*
- 5** Risks & mitigations *Page 9.*
- 6** Discussion points *Page 10.*
- 7** Focus for upcoming period *Page 11.*



Save time and deliver impact

An HR board report is a comprehensive summary of crucial HR data and initiatives presented to a board of directors. Creating an impactful HR board report is challenging. It's tempting to spend a lot of time developing an information dense deck. But is it the right information?

This HR board report template is a crucial part of your toolbox. It provides you with a clear structure to follow, ensuring consistency and clarity in your communication with stakeholders. You'll be able to save time and effort, reduce the risk of oversight, and strengthen your credibility.

Do's and don'ts when creating a high-quality HR board report



Use a clear structure

Tell a coherent story with your information by following a chronological order or grouping related data together.



Focus on key insights

Highlight the most important data and insights that align with the organizational goals.



Include too much information

Avoid using every single piece of data and stick to the most impactful information.



Ignore visualization

Use graphs, charts, and infographics to make your report more engaging and easier to understand.

1. Executive summary

The executive summary is one of the most critical parts of your board report. It provides a clear snapshot of the entire document and highlights the most pressing issues and insights.

A well-written executive summary should be concise and informative to allow decision-makers to quickly grasp the key points without going through the entire document.

It shouldn't be just a recap of your report, but an engaging section that grabs the attention of the audience and compels them to dive deeper into the subsequent sections for details.

The next page contains an example structure of an executive summary.

Four tips to writing an engaging and effective executive summary



Keep it short and concise

Make your executive summary between half a page to two pages at most. A general rule of thumb is to keep it no more than 10% of your document's total length.



Make it easy to read

Use a professional and easy-to-read font like Times New Roman, Arial, or IBM Plex Sans. The font size should be consistent, preferably between 10-12 points for the body text.



Use easy-to-understand language

Use plain language whenever possible, even if your board is familiar with HR terminology. It enhances clarity and ensures your message is accessible to everyone.



Make it standalone

Create your executive summary to stand on its own. A reader should get a clear idea about the main content and the crux of the board pack just by reading the summary.



Start the executive summary section with a concise summary of what the board will see in the rest of your report. Write maximum three paragraphs on one slide.

Present most essential information in your board report on a one-page canvas. This canvas will ensure your stakeholders quickly grasp the heart of your report without being overwhelmed by granular details.

What to include

- HR vision
- Strategic initiatives update
- Highlights of the period
- Business impact metrics
- Risks
- Focus for the coming period

All these points are presented clearly in the HR Board Report Template, which you can download on the right of this page.

HR Vision: Become a talent destination for critical talent

Strategic Initiatives

Initiative 1	RAG Status
Initiative 2	RAG Status
Initiative 3	RAG Status

Highlights of the period

- [Insert highlights here]

Business Impact Metrics

Metrics	Previous period	Current period
Metric 1		
Metric 2		

Risks

Risks	Previous status	Current status	Mitigating actions
Risk 1			
Risk 2			

Focus for coming period

- [Insert here]

Download your HR Board Report template here!

Google Slides

PowerPoint

2. Workforce profile

The workforce profile is a comprehensive overview of your organization's workforce composition.

It gives your stakeholders a clear picture of your people resources, allowing them to make informed decisions about hiring, training, talent management, retention, and so on.

Tips to get it right

- **Visualize your data** to tell a cohesive story and make your information more compelling.
- **Provide context** to help the audience better understand the implications of your data.
- **Be concise** to avoid overwhelming stakeholders with excessive details.

Data to include



Employment status

- Headcount
- Breakdown by full-time, part-time, or temporary
- Distribution across departments or units



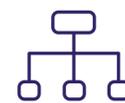
Tenure & experience

- Average length of tenure
- Breakdown of employees by tenure groups
- Average industry experience



Demographics

- Age distribution
- Gender distribution
- Race & ethnicity*
- Nationalities



Seniority

- Distribution across different job levels
- Ratio of managerial to non-managerial employees



Education

- Percentage of employees with different educational levels
- Fields of study, if relevant



Comp & Ben

- Average salary and benefits package
- Information about different incentives

**Dependent on your local privacy laws & regulations.*

3. Key metrics

The key metrics section gives your stakeholders an overview of how HR activities are contributing to the business goals of your organization.

Metrics to include

- **Productivity metrics:** revenue per employee, profit per employee, etc.
- **Recruitment impact:** cost per hire, quality of hire, and their impact on financials, productivity, and performance.
- **Turnover & retention metrics:** cost of turnover and the financial benefits of retention.
- **Employee engagement:** in relation to other relevant business metrics.
- **Talent pipeline & succession planning:** ROI & performance metrics of internal recruits.

How to communicate your key metrics

- ① **Start with the objective:** clearly define the business objectives that your HR strategies are designed to support.
- ② **Collect the data:** gather accurate data on both HR metrics and business outcomes. You can use your HRIS, financial systems, and other data sources.
- ③ **Analyze the data:** examine the data to understand how your HR initiatives connect with business outcomes.
- ④ **Visualize the data:** use charts, graphs, and tables to make the data easily digestible. Remember, your visual aids should clarify — not complicate — the data.
- ⑤ **Narrative:** build a concise narrative that explains trends, anomalies, or significant data points.

4. Strategic initiatives update

Update your stakeholders on planned or in-flight key initiatives in the strategic initiative update.

Information to include

- **Initiatives overview**
- **Status update:** discuss which initiatives are completed, ongoing, or upcoming.
- **Challenges:** mention obstacles and how you address(ed) them.
- **Key learnings:** share insights gained from the initiatives.
- **Resource allocation:** discuss how you are using resources and if you need more.
- **Recommendations and requests:** raise any requests for board actions if needed.

Strategic initiative update sample page



[Insert initiative name]

[Provide a concise overview of this initiative]

Status

[Insert visualization here]

Challenges

Challenges	Solutions
[Brief description of the challenge]	[Brief description of your solution]
[Brief description of the challenge]	[Brief description of your solution]
...	..

Key learnings

- [Brief description of what you've learned from this initiative]

Milestones

- [List the milestones that you have achieved in your initiative]

Decision required

[Include any requests for board actions that you might have]



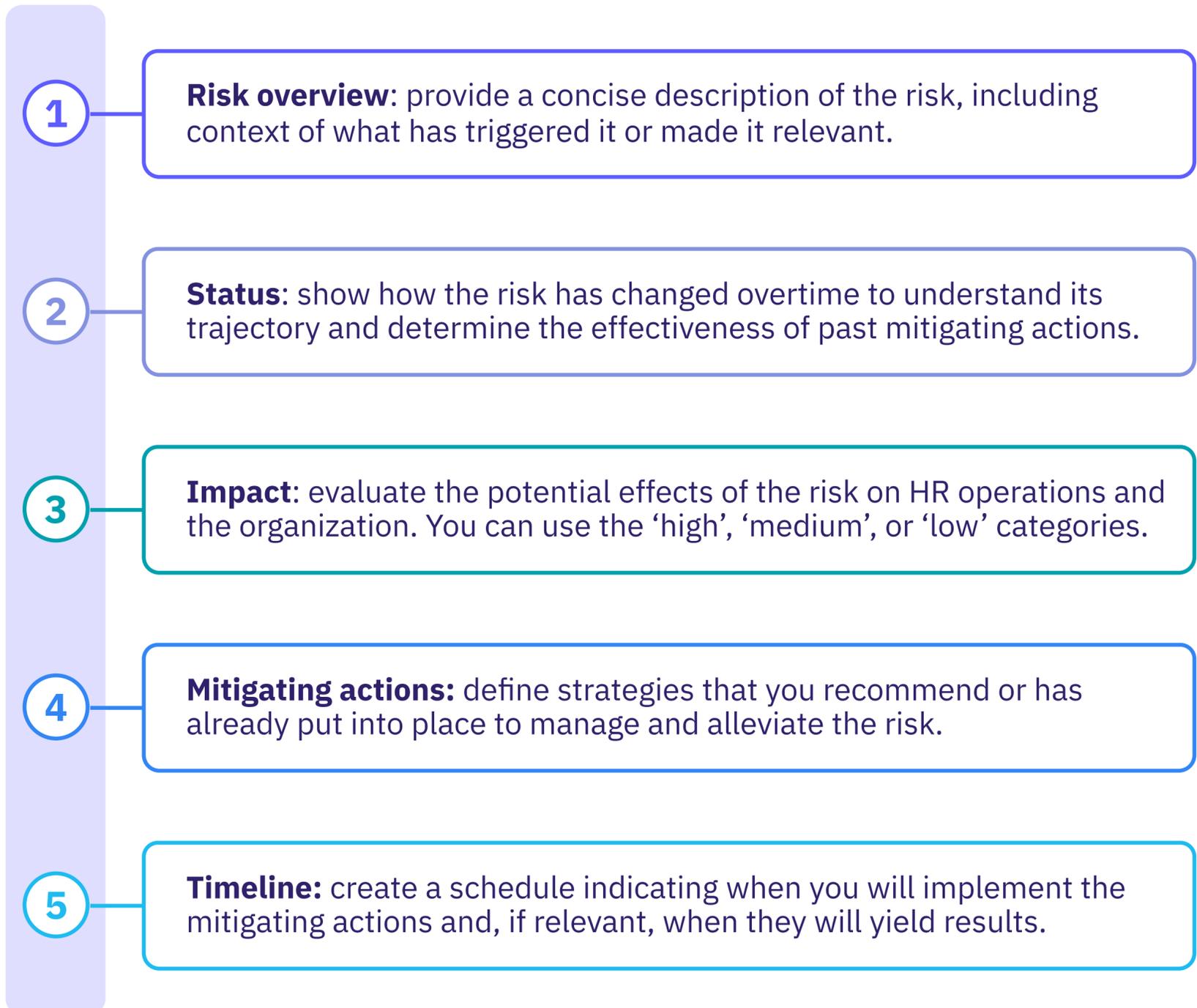
5. Risks & mitigations

In the risks and mitigations section, you will focus on identifying and evaluating potential and existing HR risks. This could be risks related to talent management, compliance, technology adoption, and more.

Start with the most pressing risks and be concise in your presentation. You don't want to confuse your stakeholders with jargon or unnecessary information. Wherever possible, back up your assessment with data.

On the right, you will find an example structure to present risk and mitigating actions to your stakeholders. Use this structure for every risk that you include in your report.

Sample structure



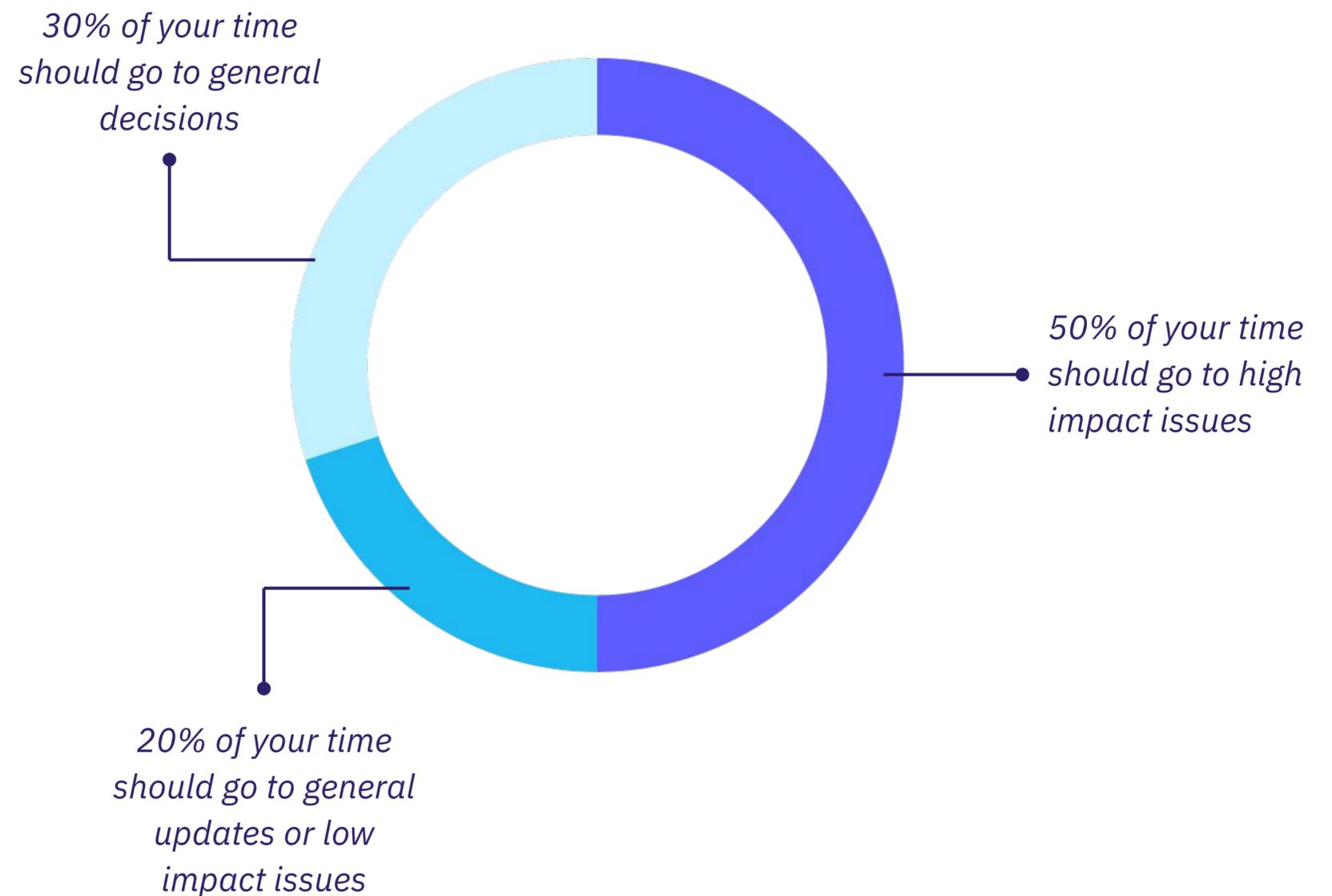
6. Discussion points

The discussion points provide a platform for key topics, concerns, and areas of interest that need to be addressed.

Topics to include

- **Emergent issues:** challenges that have come up since the last meeting and need board-level input.
- **Policy and procedure changes:** proposals or update to HR policies that need board approval or input.
- **Strategic shifts:** internal or external changes that can affect the direction of HR strategy.
- **Trending topics:** emerging HR trends, new tools or platforms, or industry change that might impact your organization.

Time allocation guideline for discussion



7. Focus of the upcoming period

Time to highlight the objectives and key initiatives that HR plans to focus on in the subsequent reporting cycle. The upcoming focus of the period section gives your stakeholders insights into future activities, allowing you to align with the board on the direction of your department.

When highlighting what you will be working on, make sure to include information such as the rationale, milestones, potential challenges and the resources that you need.

Why you should include this section



Resource allocation

Help the board understand where they need to reallocate resources to support HR initiatives



Feedback opportunity

Allow board members to provide feedback, or guidance on proposed initiatives before roll-out



Accountability & Transparency

Keep a clear record of what HR plans to do to foster responsibility and track progress



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