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|  | JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE |
| ADMIN | * New Year’s Day 01/01
* MLK Day 01/20
 | * President’s Day 02/17
* Conduct Performance Reviews
 | * End of Q1 on 03/31
* Day Light Savings Starts 03/8
 | * Good Friday 04/10
* Easter 04/12
 | * Memorial Day 05/25
 | * End of Q2 on 06/30
 |
| TOTAL REWARDS | * Draft EIP Grants
* Finalize Bonus Calculations
* Annual Perf Reviews Begin
* Form 1095-C due by 01/31
* Detailed reconciliations of Benefits
 | * 401(k) Testing Begins
* Evaluation Spreadsheets due to Office
* 2018 Bonuses paid by 02/15
* Detailed reconciliations of Benefits
 | * Total Rewards Statements Prepared
* Benefits 5500 Complete
* 401(k) Testing Ends
* 401(k) Audit Begins
* 401(k) Quarterly Enrollment
* ADP/ACP Distrib.
 | * 401(k) Excess Deferral Distributions
* Total Rewards Statements Distributed
* 401(k) Audit Ends
 | * 6 Month Perf. Reviews Prepared
* 401(k) 5500 Complete
* Update Job Descriptions
* Mid-year compensation planning: projected bonus, market pay review, etc.
 | * Rest. Manager Performance Reviews Continued
* 401(k) Quarterly Enrollment
* 6 Month Restaurant Evals
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| PAYROLL | * Forms 941, 945, W2s, W3s, 8027, 1099, and 1096 due by 01/31
* Deposit FUTA, if owed.
 | * Request new Form W-4 from exempt EEs
 | * Forms W-4 from prior year expire 03/01
* EEO-1 Survey Data from 2018 due 03/31
 | * 1094-C and 1095-C due elec. On 04/01
* 1099, 1096, 8027 due elec. on 04/01
* Form 941 (quarterly tax return) due 04/30
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| GENERAL HR | * Update Labor Posters
* Restaurant Site Visits
 | * Purge & Update Files
 | * Wage & Hour Audits
 | * Annual Harassment Training
 | * Summer Relaxed Dress & flexible Leave reminder
 | * Hurricane Readiness
* Restaurant Site Visits
 |
| RISK | * Claims Allocation
* Claims File Review
* Quarterly Risk Management Report
* Safety and Security Report
* DOL occupational Reports
 | * Claims Allocation
* Annual Claims Audit
* Safety & Security Loss Prevention Site Visit
 | * Claims Allocation
* Property Loss Prevention Site Visit
 | * Claims Allocation
* Insurance Renewal Options presented
* Quarterly Claims Report
 | * Claims Allocation
* New Policy Year Coverage Effective
 | * Claims Allocation
 |
| ENGAGEMENT | * Champagne Toast
* Announce EE of the Quarter
 | * Valentine’s Day 02/14
 | * EE Appreciation Day 03/06
* St. Patrick’s Day 3/17
 | * EE of the Quarter
* Prepare for Mom’s
* Prepare for Grads
* Admin Prof.’s Day 04/22
 | * Cinco de Mayo 05/05
* Mother’s Day 05/10
* Graduations
* Prep Father’s Day cards
 | * Father’s Day 06/21
* Spring Picnic
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| INDUSTRY EVENTS | * TDn2K’s Global Best Practices Conference
 | * IFA Annual Conference
* NRA HR Study Group
 | * SHRM Employment Law Conference
* WFF
 | * RIMS Annual Conference
 | * IFA Legal Symposium
* NRA Big Show in Chicago
 | * SHRM Annual Conference
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|  | JULY | AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER |
| ADMIN | * Independence 07/04
* P6+6
 | * Labor Day 09/07
* Budgeting
 | * End of Q3 on 09/30
* Budgeting
 | * Columbus Day & Indigenous People’s Day 10/12
* Halloween 10/31
* Budgeting
 | * Day Light Savings Ends 11/01
* Election Day 11/02
* Veterans Day 11/11
* Thanksgiving 11/26
* Annual Team Planning
 | * End of Q4 and Calendar Year 12/31
* Christmas 12/25
 |
| TOTAL REWARDS | * RFP Process for Voluntary Benefits
 | * Selection FY/Next FY Voluntary Benefits
* Create/Distribute VB Enrollment Guides and Communication
 | * Voluntary benefits Enrollment
* RFP Process for Managerial Benefits
* 401(k) Quarterly Enrollment
* 401(k) Summary Annual Report
 | * Selection of Next FY Managerial Benefits
* Draft Next FY Bonus
* Create/Distribute Managerial Benefits Enrollment Guides and Communication
 | * 401(k) Investment Committee meeting and recommendation
* Create/Obtain Next FY Holiday Calendar
* Managerial Benefits Enrollment
 | * 401(k) Quarterly Enrollment
* Finalize Next FYE Bonus Plan and Plan Documents
 |
| PAYROLL | * Form 941 (quarterly tax return) due 07/31
 |  | * National Payroll Week 02-06
 | * Form 941 (quarterly tax return) due 10/31
 | * Remind EE to submit a new W4 if withholding allowances have changed.
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| GENERAL HR | * Update Stock EE Photos for Fall Materials
* Handbook Update in advance of Fall Hiring
 | * Rollout new Handbook if applicable
* Restaurant Site Visits
 | * End of Year PTO/Vacation Planning
 | * Flu Shots (onsite & vouchers)
* Winter & Holiday Safety & Security Advisory
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| RISK | * Claims Allocation
* Quarterly Risk Management Report
* OSHA 300A,300,301
 | * Claims Allocation
* Claims File review
 | * Claims Allocation
* Safety and Security Loss Prevention Site Visit
 | * Claims Allocation
* Quarterly Risk Management Report
 | * Claims Allocation
* Insurance Renewal Strategy
 | * Claims Allocation
* Updated renewal exposures
 |
| ENGAGEMENT | * EE of the Quarter
* Celebrate Fourth of July with Steaks
 |  |  | * EE of the Quarter
* Prep cards for Veterans Day
* Boss’s Day 10/16
* Conduct Annual Employee/Office Satisfaction Survey
 | * Thanksgiving Turkeys
* Veteran’s Day Cards
 | * Holiday Party
* Satisfaction Survey Results compiled and presented
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| INDUSTRY EVENTS | * CHART
 |  |  | * HR Southwest (Fort Worth)
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