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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 |
| 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 |  |  |
| 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 |
| 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. |  |
| 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 |  |  |
| 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 |
| INDUSTRY EVENTS | * CHART |  |  | * HR Southwest (Fort Worth) |  |  |