



GENERAL BULLETIN

CONNECTICUT
BANKERS
ASSOCIATION
10 Waterside Drive
Farmington, CT 06032-3083
(860) 677-5060
FAX: (860) 677-5066

2010 – 42

March 4, 2010

SENT TO:

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

CEO, CEO+
Human Resources

RE: Workforce Analysis Questionnaire
As of December 31, 2009

We are pleased to enclose the Workforce Analysis Questionnaire for your review and completion. Updated annually, the Workforce Analysis Survey provides valuable information on staffing levels for Connecticut financial institutions. The survey lists the full-time equivalence for management and staff positions for over fifteen departments or functions.

RESULTS

The results for the Workforce Analysis Survey will list each responding bank individually, according to asset size. Only those banks contributing data will receive a copy of the complimentary results. As a reminder, thirty-six member banks participated in last year's Workforce Analysis Survey.

DEADLINE

The Workforce Analysis Survey has received high praise in the past and continues to provide important information on staffing levels for Connecticut financial institutions. We strongly urge your participation in this survey, as this information is not available elsewhere. As a reminder, the final report will only be available to participating banks.

The response deadline is **Thursday, March 25, 2010**. If all responses are received by that date, we should be able to publish the results by April. Should you have any questions regarding the accompanying pages, please do not hesitate to call me at the Association office.

Sincerely,

COLLEEN E. CLANCY
Vice President

CONNECTICUT BANKERS ASSOCIATION
Workforce Analysis Survey
As Of December 31, 2009

INSTRUCTIONS

Information reported should only pertain to the bank. Do not include holding company or subsidiary information.

I. STATISTICAL INFORMATION

Total Yearly Salaries/Bonuses – Report total salaries and bonuses paid from January 1, 2009 - December 31, 2009 for all full-time and part-time employees.

Pension Plan Contributions - Include pension contribution amounts that were made for the calendar year **OR** that would have been made except for the full funding limit of ERISA or FASB87. Include bank payments for defined benefit, defined contribution (ESOP, TRASOP, PAYSOP, 401(k)) and administrative costs (**DO NOT PUT \$0**).

Welfare Benefits - Include bank costs for health/dental/life insurance and short/long term disability etc.

Other Benefits - Include tuition reimbursement, workers compensation, education/training expenses, meal money, employee discounts, service awards, EAP, bank fee waivers etc.

II. EMPLOYEE INFORMATION

Number of Full-time Employees and Number of Part-time Employees - Report number of **actual** full-time or part-time employees only, including tellers, as of 12/31/08. Do NOT include unfilled positions. Each full-time employee should be reported as 1 employee and each part-time employee should be reported as .5 employee.

Number of Unfilled Positions - Report number of full-time equivalent positions, including tellers, expected to remain unfilled for at least six months.

Annual Turnover Rate -
$$\frac{(\text{Total terminations from 1/1/09 through 12/31/09}) \times 100}{(\text{Beginning year employee headcount}) + (\text{Ending year employee headcount}) / 2}$$

Include voluntary and involuntary separations from January 1, 2009 - December 31, 2009.

III. OFFICER POSITIONS

Include all elected officers by title description or equivalent functional title. These individuals should also be reported by DEPARTMENT/FUNCTION in Section IV.

Example: Vice President of Marketing is counted once under OFFICER POSITION (Section III) of Vice President and once under DEPARTMENT/FUNCTION (Section IV) of Marketing.

IV. DEPARTMENT/FUNCTION

All responses should include the **full-time equivalence** for management and staff positions assigned to that department or function. For ease in reporting, **full-time equivalence** is equal to the following:

**Each full-time employee should be reported as 1 employee and
each part-time employee should be reported as .5 employee.**

CONNECTICUT BANKERS ASSOCIATION

WORKFORCE ANALYSIS SURVEY AS OF DECEMBER 31, 2009

Bank: _____

Completed By: _____

Phone: _____

E-mail: _____

Please refer to the Instruction Page when completing the questionnaire.

Please return completed questionnaire by **Thursday, March 25, 2010** to:

Colleen E. Clancy
Vice President
Connecticut Bankers Association
10 Waterside Drive
Farmington, CT 06032-3083
Fax (860) 677-5066

CONNECTICUT BANKERS ASSOCIATION
Workforce Analysis Survey
As Of December 31, 2009

Please refer to the Instruction Page when completing

I. STATISTICAL INFORMATION	
1. Number of Branches (include main office and supermarket branches)	#
2. Number of Supermarket Only Branches	#
3. Number of On-site ATM's	#
4. Number of Off-site (satellite) ATM's	#
5. Total Yearly Salaries/Bonuses	\$
6. Pension Plan Contributions (DO NOT PUT \$0)	\$
7. Welfare Benefits	\$
8. Other Benefits	\$
9. Name of HRIS Software Bank Utilizes	

II. EMPLOYEE INFORMATION	
1. Number Of Full-Time Employees (include tellers)	#
2. Number Of Part-Time Employees (include tellers)	#
3. Total FTE (# of full-time employees + (# of part-time employees/2) should equal Total FTE on page 2)	#
4. Number Of Full-Time Tellers Only	#
5. Number of Unfilled Positions	#
6. Annual Turnover Rate - Full-time Employees <small>(Total terminations from 1/1/09 through 12/31/09) X 100</small> <small>(Beginning year employee headcount) + (Ending year employee headcount) / 2</small>	%
6. Annual Turnover Rate - Part-time Employees <small>(Total terminations from 1/1/09 through 12/31/09) X 100</small> <small>(Beginning year employee headcount) + (Ending year employee headcount) / 2</small>	%

III. OFFICER POSITIONS	# OFFICERS
1. Chief Executive Officer/President	#
2. Number of Executive Vice Presidents	#
3. Number of Senior or First Vice Presidents	#
4. Number of Vice Presidents	#
5. Number of Assistant Vice Presidents	#
6. Number of Other Officers	#

Report bank information only (do not include holding company or subsidiary information).

CONNECTICUT BANKERS ASSOCIATION
Workforce Analysis Survey
As Of December 31, 2009

IV. DEPARTMENT/FUNCTION	FULL-TIME EQUIVALENCE *
1. Executive Management (President, CEO, Executive Secretary)	
2. Administrative Services (Facilities, Purchasing, Mail Room, Maintenance, Security, Courier, Others)	
3. Audit / Compliance / Legal / CRA	
4. Business Development / Community Development	
5. Cash Management / Lockbox	
6. Financial Management (CFO, Controller, Investments, Accounting, Finance, Treasurer, Bookkeeper, Others)	
7. Human Resources (Personnel, Training, Compensation, Benefits, Recruiter, Others)	
8. Investment Brokerage (Infinex, In-house, Invest, Others)	
9. Lending Departments (Exclusive of Branch Personnel):	
General Administration (CLO, Real Estate, Others)	
Commercial Lending Department (includes real estate and non-real estate)	
Commercial Non-Real Estate Lending Department (if separate from above)	
Commercial Real Estate Lending Department (if separate from above)	
Consumer Lending Department	
Residential Real Estate Lending Department	
Loan Administration (if separate from any of the above departments)	
Loan Servicing / Review (if separate from any of the above departments)	
Collections	
Credit	
10. Marketing (Advertising, Public Relations, Others)	
11. Operations / Deposit Department:	
General Administration (COO, Records Retention, Safe Deposit, Deposit Operations, Others)	
Savings Services (Checking, NOW Accounts, Deposit Services, Others)	
Electronic Banking	
Proof / Item Processing / Balance	
Retirement Plans Services	
Savings Bank Life Insurance	
12. Retail Operations (include main office):	
General Administration (Branch Administrator, Regional Branch Manager, Retail Sales, Others)	
Branch Manager	
Assistant Branch Manager	
Head Teller	
Teller / Senior Teller	
Customer Service Representative	
Call Center	
Supermarket Banking	
13. Risk Management (CRO, Others)	
14. Secretarial / Clerical / Word Processing	
15. Switchboard Operator / Receptionist	
16. Technology (CIO, Systems, ATM, MIS, Data Security, Network, Telecommunications, Others)	
17. Trust	
18. Other Functions / Departments Not Listed:	

TOTAL FTE _____

Individuals responsible for more than one function should be reported in the function that represents 75% or more of their duties and should only be counted once.

* Each full-time employee should be reported as 1 employee and each part-time employee should be reported as .5 employee.