



2025 HR Compliance Budget Planning Checklist

Effectively managing an HR budget ensures compliance, promotes equity, and supports employee engagement and retention. Use this checklist to identify critical budget areas and guide your resource allocation for 2025. Use this checklist to ensure your to-dos are complete throughout the year.

Federal and State Compliance costs

- **OFCCP Audit Support** – allocate funds for audit preparation, consulting, and any required documentation.
- **State Pay Data Reporting**– address specific state mandates for pay data reporting, i.e. California pay transparency requirements.
- **Affirmative Action, EEO-1, and VETS Reporting** – include budget for affirmative action plan preparation and EEO-1/VETS-4212 reporting.

Pay Equity Initiatives

- **Salary Benchmarking and Pay Equity Audits** – include costs for analyzing market competitiveness and conducting pay audits to identify and address inequities.
- **Pay Communication Plan** – Budget for developing a strategy to clearly communicate pay structures and changes to employees.

Labor Law Posters and Compliance

- **Compliance Posters** – set aside funds for updated workplace compliance posters and digital solutions to meet federal and state requirements, consider a subscription plan.

Workplace Safety and OSHA Reporting

- **Safety and OSHA Compliance** – budget for safety programs, training and software to maintain OSHA compliance.
- **Safety Programs** – budget for occupational health and safety equipment and certifications.
- **Workplace Security** – Include costs for cybersecurity measures, facility security, and physical safety needs.

Talent Acquisition and Recruitment

- **Job Listing Services** – allocate funds for job boards and platforms.
- **Recruitment Tools and Software** – Budget for recruitment software, ATS and other tools that streamline hiring.
- **Recruitment Agency Fees** – If using recruitment firms, include costs for agency fees.
- **Paid Search Initiatives** – Reserve funds for paid advertising to expand your talent search.
- **Analytics and Reporting Tools** – Plan for tools to measure recruitment success and optimize strategies.
- **Employer Branding** – Allocate resources for employer branding initiatives to enhance reputation and attract talent.
- **Diverse Talent Networks and Platforms** – invest in partnerships with networks and platforms that prioritize diverse hiring.



Benefits Management and ACA Reporting

- **Health and Wellness Benefits** – budget for health, dental, vision, and life insurance with adjustments for rising costs, wellness programs i.e. gym memberships, smoking cessation, etc.
- **Retirement Plans** – review and budget for contributions to 401(k) or pension plans.
- **Paid Leave Programs** – assess costs related to paid sick leave, vacation, family leave, PTO.
- **ACA Compliance Reporting** – budget for tracking and reporting employee health coverage data as required by the Affordable Care Act.
- **Employee Resource Groups** – plan funding for workplace culture, events, training.
- **Professional Development** – allocate funds for training programs, certifications, and professional development courses.
- **Compliance Training** – budget for annual mandatory training on topics such as affirmative action, sexual harassment and safety.
- **Onboarding and Orientation** – ensure budget for onboarding materials, orientation sessions, and any related software or tools.
- **Employee Engagement Surveys and Tools** – budget for tools to measure and enhance employee satisfaction and productivity.

Compliance Implementation

- **AAP Implementation** – include funds for consulting and internal auditing of processes to ensure proper execution of the program.
- **Diversity Audits** – budget for periodic audits to evaluate any gaps.

Technology and Systems

- **HRIS and Payroll Systems** – budget for HR software, HRIS and payroll systems
- **Data Analytics and Reporting Tools** – consider investing in tools for tracking HR metrics i.e. turnover, engagement scores, etc.

Employee Relations and Retention

- **Employee Recognition Programs** – budget for recognition program to enhance engagement i.e. awards, gifts, events, etc.
- **Survey and Feedback Initiatives** – Plan for tools or consultants to conduct employee engagement surveys and feedback programs.
- **Conflict Resolution and Mediation** – Include resources for employee relations programs, including mediation and resolution resources.

Other HR Expenses

- **Legal Fees** – plan for potential legal expenses related to employment law, contracts, and disputes.
- **HR Conferences and Seminars** – budget for HR team's participation in industry conferences, seminars, and webinars to stay current on trends.
- **HR Marketing and Communications** – allocate funds for internal HR communications, newsletters, and employee engagement campaigns.
- **Contingency Funds** – set aside contingency funds for unexpected HR expenses or emergency response.

