



CUPA-HR Survey Participation – Everything You Need to Know

Tuesday, September 19, 2023 | 2:00-3:00 p.m. ET

Sponsored by



cornerstone

CUPA-HR Webinar

Presenters



Jacqueline Bichsel
Director of Research
CUPA-HR



Melissa Fuesting
Senior Survey Researcher
CUPA-HR

Agenda

- CUPA-HR Surveys – Introduction
- What's New in 2024?
- Data Checklists
- Prepare Early, Participate Pain-Free
- Where to Go for Help



Signature Workforce Surveys

Administrators

Faculty

Professionals

Staff

Benefits

- Salary
- Position or Rank/Discipline
- Gender
- Age
- Years in Position/Rank
- And more...!

- Healthcare Plans
- Wellness Programs
- Dependent Care
- Paid Time Off
- Tuition Reimbursement and Student Loan Repayment Assistance
- Retirement

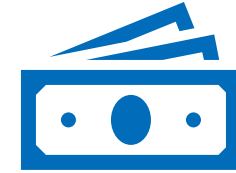
OUR MISSION



Provide the most comprehensive and reliable salary, demographic, and benefits data possible for higher education benchmarking



Be your resource for data access, analysis, and interpretation



Help you use data to solve strategic problems

Budgeting

Pay equity and representation

Salary ranges

Succession planning

Staff Size

Benefits offerings

A red helicopter is shown in flight, viewed from a low angle. The helicopter is red with black rotor blades and landing skids. The registration number 'G-HWKW' is visible on the side of the fuselage. The background is a blue sky with scattered white clouds.

Your Role in the Mission

- Provide your data!
- Use the data!
- Be the source of data at your institution!

DataOnDemand

Administrators

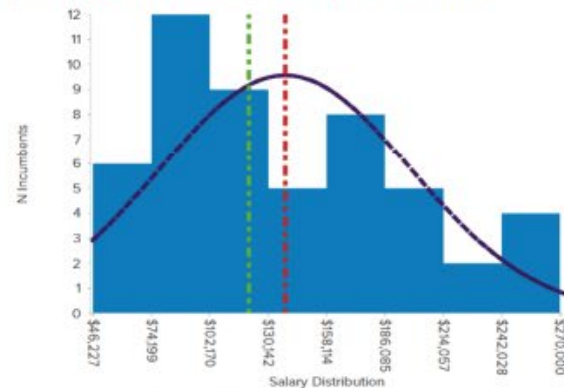
Faculty

Professionals

Staff

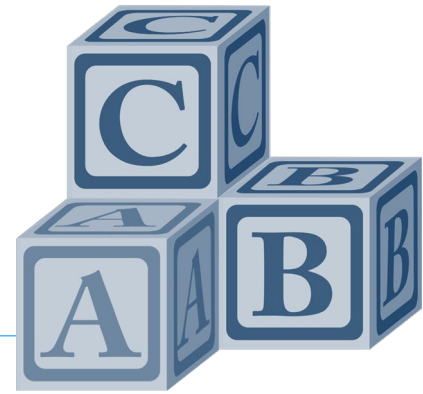
Benefits

[196270] Chief Risk Mgt/ Compliance Officer



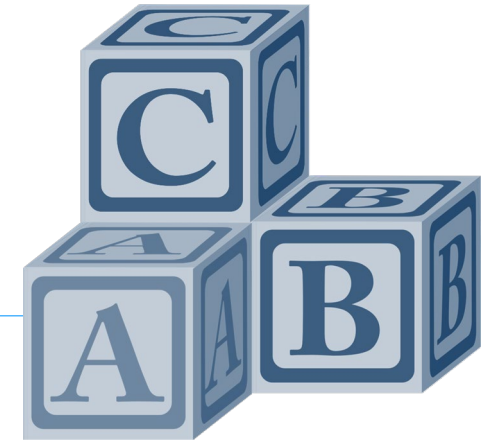
DATA COLLECTED AND CHANGES FOR 2023-24

Institutional Basics



- Institutional Basics help us classify institutions for benchmarking and creating comparison groups
- Must be completed before surveys can be marked complete
- Some questions may be completed by Institutional Research on your campus

Institutional Basics



- Data on total expenses; student, faculty, staff FTEs are required
- Other questions (e.g., CHRO reporting, collective bargaining, separations) are voluntary

WHAT'S NEW?

Benefits Survey Changes:

- SECURE 2.0-Related Policies
- Student loan repayment assistance
- PTO: Holidays, winter closures, and summer hours



Data Checklist for Administrators, Professionals, and Staff Surveys

- Position Number**
- Annualized salary for each incumbent**
- Gender**
- Race/ethnicity**
- H1-B status**
- Year of entry into current position**
- Birth year**
- State of residence**
- Faculty status (yes/no) for Assoc./Asst. Deans in *Administrators Survey***
- System-level position (yes/no) for systems only in *Administrators Survey***
- Bonus eligibility (yes/no) for coaches only in *Professionals Survey***
- Exempt status in *Professionals Survey* only**
- FT/PT status in *Professionals Survey* and *Staff Survey***

*bold fields are required

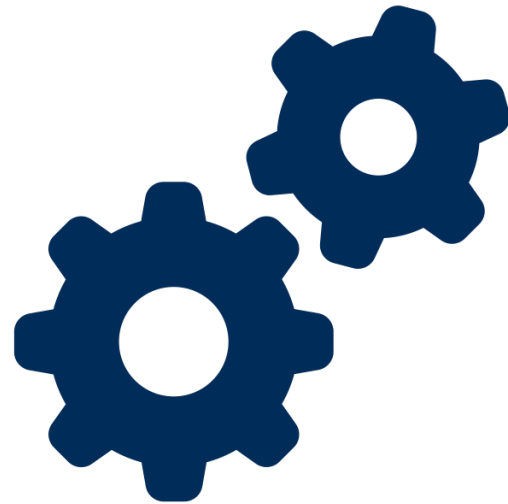
Data Checklist for Faculty Survey

- CIP Code**
- Rank (new asst., asst., assoc., prof.)**
- 9-10 month base salary**
- Gender
- Race/ethnicity
- H1-B status**
- Year promoted to current rank
- Birth year
- Highest degree attained**
- State of residence**
- Department head/chair status (yes/no)
- Supplemental salary
- Summer salary
- Course relief
- Number of adjunct/PPC faculty (aggregate data collection)
- Total number of semester credit hours taught
- Average, lowest, and highest salary received per semester credit hour

*bold fields are required

How To Participate

A step-by-step guide to a pain-free survey experience



2023-24 Survey Participation Dates

SEPTEMBER 5

Survey participation begins!
SPIT files posted to the
CUPA-HR website.



NOVEMBER 1

Data upload window opens.

DECEMBER 22 – JANUARY 1

CUPA-HR closed for the
holidays.

**PUT THESE
ON YOUR
CALENDAR!**

JANUARY 11

Data collection ends at 5:00 pm ET.

September-October Planning Guide

- ❑ **UPDATE** data providers for all surveys.
- ❑ **MATCH** position descriptions and CIP codes to incumbents using SPIT files.
- ❑ **ASSEMBLE** your team who will gather, prepare, and enter all data, including Institutional Basics.
- ❑ **PREPARE** salary and demographic data upload files for Administrators, Faculty, Professionals, and Staff surveys.



Data Provider Management

- Easily view and edit data providers.
- Login is required. Access restricted to CHRO, CUPA-HR membership contact, and current data providers.
- Data provider notified via email when access added – within five minutes.

Data Provider Management

View all data providers and their access or view the listing by survey.

		<u>Title</u>	<u>Administrators</u>	<u>Professionals</u>	<u>Staff</u>	<u>Faculty</u>	<u>Benefits</u>
Edit	Johnny Appleseed	Apple Farmer	Yes	No	Yes	No	No
Edit	Bilbo H. Baggins, Jr.	Wandering Hobbit	Yes	Yes	Yes	Yes	Yes
Edit	Wonder Woman	Superhero	Yes	No	No	No	No

Position/Discipline Matching

- Matching is to CUPA-HR position number (administrators, professionals, staff) or IPEDS CIP code (faculty)
- Matching positions and disciplines is what takes the most time for those who are new to CUPA-HR surveys
- Always check the SPIT to see what has been changed/added/deleted from last year
- Check/search position *descriptions* to find matches on key words





- Outsourced positions
- Vacant positions
- Acting or interim incumbents
- Laid-off incumbents (but DO report those who are furloughed)
- Any incumbent who works less than half-time
- Seasonal incumbents
- Positions that earn stipends rather than salaries
- The same position in more than one survey

November Planning Guide

- ❑ **UPDATE** participation status for each survey you're completing to 'will participate'. Surveys > Survey Menu

- ❑ **UPLOAD** your prepared files for Administrators, Faculty, Professionals, and Staff surveys.

- ❑ **ENTER** manual data.
 - Institutional Basics
 - Benefits Survey
 - Executive Information on Administrators Survey
 - Adjunct Information on Faculty Survey



December Planning Guide

- ❑ **DOWNLOAD** PDF/Excel file of data submitted and review for accuracy.
- ❑ **CONFIRM** in SOL that you have checked for each survey “My institution has completed this survey.” Confirm that you have received an email stating the research team has received your data.
- ❑ **RESPOND** to inquiries from our research team about any questionable data points.
- ❑ **RELAX** and enjoy the holidays. You’re done!





How do I get
started **RIGHT**
NOW?

SPIT File



Upload template

Upload directions

Survey instructions

**Position descriptions or
CIP codes**

Login, dates, links

Institutional basics

Survey Participation and Information Templates

Survey Information



	A	B	C	D	E	F	G	H	I
1	CUPA-HR PROFESSIONALS SURVEY INFORMATION 2023-24 Updated 8/29/23								
2	<i>All data must be entered into Surveys Online by January 11, 2024.</i>								
3	TABLE OF CONTENTS: SURVEY INFORMATION								
4	Research Mission								
5	Confidentiality and Privacy Statement								
6	Reporting/Effective Dates for Data								
7	Data Collected in This Survey								
8	Guidelines for Entering Data								
9	How to Annualize Salaries								
10	How to Submit Your Data								
11	Systems and System Offices								
12	Instructions for Entering Data in Surveys Online								
13	Survey Completion Process								
14	Questions								
15	RESEARCH MISSION								
16	<p>CUPA-HR maintains one of the largest workforce databases in existence. For more than 50 years, we have provided higher ed institutions with the most up-to-date, reliable, and comprehensive salary, benefits, and workforce data available. We would not be able to do that without your participation. Four of five institutions that participate in our surveys have been providing us with data for more than ten years! We invite you to be full participants in our mission to remain the platinum standard in higher ed workforce data by providing as much data as possible for all our surveys: Administrators, Professionals, Staff, Faculty, and Benefits. Even if you don't think you will use/purchase the data for the upcoming academic year, remember that our other participants are relying on you to do your part in helping us provide the most comprehensive benchmarking data at a reasonable cost. We thank you!</p>								
17	<p>The Professionals Survey collects data for 'functional professional' positions with primary assignments and responsibilities requiring professional-level expertise and work in a specific functional area, such as academic or student services, facilities management, human resources, information technology, athletics, etc. Positions covered include those with supervisory duties that do not represent the majority of their time and effort. Positions generally require at least a baccalaureate degree or equivalent in the field and may require a terminal degree and/or professional licensure in the field. Data are collected for each professional (incumbent). Although some of the data requested is optional, four of five institutions provide all of it. We hope you will do your best to provide us with all this data so you have the most reliable, comprehensive resource possible for benchmarking.</p>								
	<p>The positions in this survey are grouped into the following broad categories:</p> <ul style="list-style-type: none">Academic AffairsAthleticsExternal AffairsFacilities								

Upload Directions



	A	B	C
1	UPLOAD DIRECTIONS FOR FACULTY SURVEY		
2	<i>NOTE: In order for the upload file to work, your SPIT file needs to be saved with the UPLOAD TEMPLATE tab as the first tab in the worksheet. Do not rearrange the tab order.</i>		
3	<i>Review the SURVEY INFORMATION tab for reporting dates, survey changes, and other important guidelines.</i>		
4	PREPARING UPLOAD AND COMPLETING INSTITUTIONAL BASICS		
5	Data is submitted by uploading your data file to Surveys Online. The upload file type is Microsoft Excel (XLS or XLSX). The upload option is for incumbent-related data only. After uploading, it is possible to make minor changes manually in the survey form, but this option is not recommended for initial data entry. Data on Institutional Basics must be entered manually in Surveys Online.		
6	FORMATTING YOUR DATA FILE FOR UPLOAD		
7	<ul style="list-style-type: none"> There are three methods of creating an upload file: <ol style="list-style-type: none"> Use the UPLOAD TEMPLATE (preceding tab in this file). Create your own file using the headings in the first row of the template (which match the Field Names in the table below). Note: the headers must match exactly or your file will not upload. 		
8	<ol style="list-style-type: none"> You will also need to duplicate the formatting in the data cells. 		
9	<ol style="list-style-type: none"> Download your institution's Excel data from last year. This download will enable you to update last year's data file with current salaries, add new employees, and delete employees who are no longer with the institution. To access this file, login to Surveys Online, hover over Surveys on the top menu bar then click on Survey Menu. Find the survey for which you want last year's data, and in the column titled Year, select the previous year. Next, click the survey name with the blue hyperlink. Finally, scroll down to the section titled Completion Process and select Click for an Excel export of your survey. You will need to create any new fields/variables added this year and duplicate the data formatting to the upload template. 		
10	<ul style="list-style-type: none"> Accepted File Types: Microsoft Excel (XLS, XLSX) 		
11	<ul style="list-style-type: none"> Data validation/formatting has been duplicated down to line 8000 in the upload template for this survey. If you enter more incumbents than this, you will need to duplicate this formatting for each 		
12	<ul style="list-style-type: none"> If using the UPLOAD TEMPLATE, be sure to click in the UPLOAD TEMPLATE tab before saving. The upload program will only read data in the worksheet that was last saved, and you want that to be the upload template. Alternatively, save the upload template worksheet as a separate file, so you don't forget. That may also make it easier to go back and forth between these instructions and your upload file. 		
13	<ul style="list-style-type: none"> DO NOT change the header record or first row that identifies the fields or columns in the file. Changing the headers or first row will cause an error when uploading the file. 		
14	<ul style="list-style-type: none"> The headers are pre-populated in the UPLOAD TEMPLATE. This table explains each column and its expected format. Leave optional fields blank if you're not providing data. 		
15	Column	Field Name (must be exactly as shown)	Content and Format
16	A	intref	Internal reference: Identify the incumbent whose data you are providing (e.g., a payroll number). Do not use the incumbent's name or SSN. This field is optional and for your convenience. We do not use this data.
17	B	tenureType	There are three valid tenure types: TT (Tenured/Tenure Track), NT (Non-Tenure Track Teaching), and NR (Non-Tenure Track Research). Refer to the SURVEY INFORMATION tab for an explanation of these tenure types. This is a required field.
18	C	CIP	The 4- or 6-digit CIP Code. Accepted entries are in the form XX.XXXX or XX.XX (e.g., 10.02 or 10.0203). Must be formatted as text (non-numeric). This is a required field.
19			For each tenure type, the following are valid faculty ranks. Accepted entries are the single digit rank code (1 - 6): Tenured/Tenure Track: 1 (Professor) 2 (Associate Professor) 3 (Assistant Professor) 4 (New Assistant Professor) 5 (Instructor) Non-Tenure Track Teaching: 1 (Teaching Professor)

Position Descriptions or CIPS



A	B	C	D	E
CUPA-HR ADMINISTRATORS SURVEY POSITION DESCRIPTIONS 2023-24				
The Administrators Survey collects salary data for 203 positions with primary assignments requiring management of the institution or of a customarily recognized division within it. SOC Crosswalks are provided to facilitate completion of IPEDS and other reporting, but these codes are not used in this survey.				
CHANGES TO THIS YEAR'S POSITIONS: Amended Chief of Staff (187020) title and position description to include what are essentially overlapping functions for Chief of Staff and Chief Strategy Officer.				
Position Number	Title/Role	Position Description	2018 BLS SOC #	BLS Standard Occupational Code (SOC) Category Name
Top Executive Officers: 100000 - 105000				
100000	Chief Executive Officer, System	President. Directs all affairs and operations of a higher education system or district. Each subordinate campus has its own President, Chancellor, or Provost; administrative offices; and independent programs. Should be reported only by flagship campus.	11-1011	Chief Executives
101000	Chief Executive Officer, Single Institution or Campus within a System	President or Chancellor. Directs all affairs and operations of a higher education institution or of a campus within a system. If the incumbent serves as both a system and flagship campus president, report as system only.	11-1011	Chief Executives
102000	Executive Vice President or Vice Chancellor	Responsible for all or most functions and operations of an institution under the direction of the Chief Executive Officer. If the incumbent is also the Chief Academic Affairs Officer or Provost, report in 105000 and not here.	11-9033	Education Administrators, Postsecondary
105000	Chief Academic Affairs Officer or Provost	Directs the academic program of the institution. Overall responsibilities typically include academic planning, teaching, research, extensions, and coordination of interdepartmental affairs (e.g., Admissions, Registrar, and Library).	11-9033	Education Administrators, Postsecondary
Senior Institutional & Chief Functional Officers: 106000 - 145000				
Persons in these positions direct a major functional area with institution-wide scope or impact and also the work of other professional employees. Report to a top executive officer or to another senior institutional officer.				
106000	Chief Administrator, Campus or Site	Responsible for the functions and operations of a satellite campus or site. Does not hold the title of a top executive officer.	11-9033	Education Administrators, Postsecondary
107000	Chief Business Officer	Responsible for the combined functions of administrative and financial affairs. Overall responsibilities typically include accounting, purchasing, physical plant and property management, human resources, food services, auxiliary enterprises, investments, and related business matters.	11-9033	Education Administrators, Postsecondary
109000	Chief Athletics Administrator	Provides administrative direction and oversight for all intercollegiate, intramural, and recreational athletics staff, programs, facilities, and activities. Responsible for ensuring compliance with all federal, divisional, and university athletics regulations and for administering departmental funds and accounts. Develops short-term goals and long-term strategic plan and vision for the department. Oversees departmental fund-raising, public relations,	11-9033	Education Administrators, Postsecondary

Login, Dates, & Links



	A	B	C	D	E	F	G	H
1	LOGIN INFORMATION AND IMPORTANT DATES AND LINKS							
2	• Go to this link: https://www.cupahr.org/surveys/about-research/sol-login/							
3	• Click the GO TO SURVEYS ONLINE button.							
4	• Enter your confidential CUPA-HR username and password, then click the Sign In button.							
5	• After logging in, place your cursor over Surveys on the top menu bar, and open the Survey Menu .							
6	• Locate the survey you want to complete on the list.							
7	• Check the box in the "Your Institution..." column to indicate that you "Will Complete" the survey.							
8	• Click the name of the survey to access the survey form when you're ready to begin submitting data.							
9	• If your institution will not participate in this survey, please check the "Won't Complete" box. That will take you off our list for future reminders.							
10	Data cannot be entered or uploaded until the above steps have been completed.							
11								
12	IMPORTANT DATES							
13	Survey participation begins			Tuesday, September 5, 2023				
14	Data uploads begin			Wednesday, November 1, 2023				
15	Data collection ends			Thursday, January 11, 2024				
16	Effective date for data			Wednesday, November 1, 2023				
17	IMPORTANT LINKS							
18	Participation Information			https://www.cupahr.org/surveys/survey-participation/				
19	Update Data Providers			https://www.cupahr.org/surveys/survey-participation/				
20	Results			https://www.cupahr.org/surveys/pricing-and-ordering/				
21	About/Ask Research			https://www.cupahr.org/surveys/about-research/				
22	© Copyright 2023 by the College and University Professional Association for Human Resources (CUPA-HR). This document is protected by copyright and may be reproduced only for the purpose of submitting data to CUPA-HR or with prior written permission of CUPA-HR.							

How We Communicate With You

Emails to data providers

Data User Group

Emails to CHRO

CUPA-HR eNews

Surveys Online

How to Contact the CUPA-HR Research Team

**Ask Research or
research@cupahr.org**



**Attach relevant file or
screenshot**



**Provide specifics
of your issue**



**Avoid the rush –
ask early**



Important Links

Participation Information and Schedule

<https://www.cupahr.org/surveys/survey-participation/>

Add/Remove/View Data Providers

<https://www.cupahr.org/surveys/survey-participation/>

Purchasing DataOnDemand

<https://www.cupahr.org/surveys/pricing-and-ordering/>

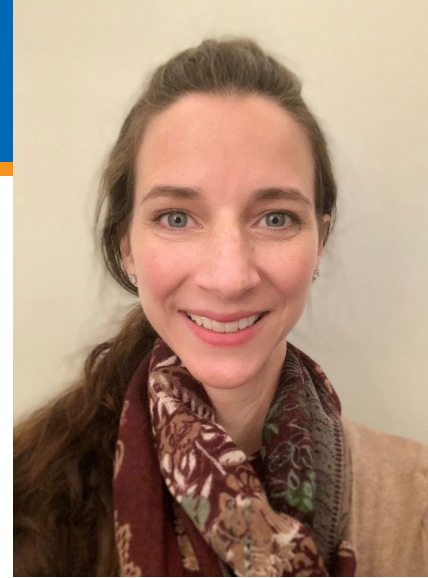
Data User Community

<https://connect.cupahr.org/home>

research@cupahr.org



← Jackie



Diana →



↑ Melissa



Jennifer →



↑ Kate



← Suzi



Thank You

Please complete your event evaluation

Sponsored by



cornerstone