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 2023?

➢ Data Checklists

➢ Prepare Early, Participate Pain-Free

➢ Where to Go for Help

Salary and Demographic Surveys

Administrators

Faculty

Professionals

Staff

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

Benefits Survey

Benefits

- Healthcare Plans
- Wellness Programs
- Dependent Care
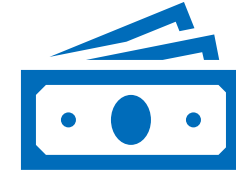- Paid Time Off
- Tuition Reimbursement
- Retirement

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

Your Role in the Mission

➢ Provide your data!

➢ Use the data!

➢ Be the source of data at your institution!

DATA COLLECTED AND CHANGES FOR 2022-23

Institutional Basics
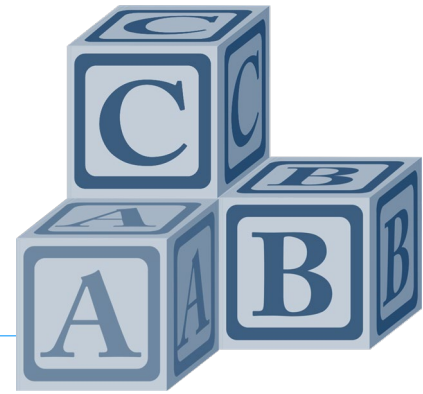
- Institutional Basics help us classify institutions for benchmarking and creating comparison groups

- Must be completed before surveys can be marked complete

- Some questions may be completed by Institutional Research on your campus

Institutional Basics
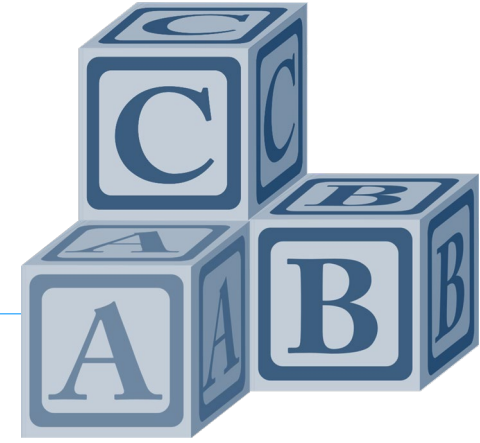
- Data on total expenses; student, faculty, staff FTEs are required

- Other questions (e.g., CHRO reporting, collective bargaining, separations) are voluntary

WHAT'S NEW?

Benefits Survey Changes:

- Dependent Care

- Details on HSAs and HRAs

- Orthodontics

- Unlimited PTO

Survey Participation and Information Templates (SPITs)

Your integrated source for participation information for each survey: www.cupahr.org/surveys/survey-participation/templates/

SPITs contain:
- Data collected
- Instructions
- Upload template
- Position descriptions/Disciplines
- Common errors
- Deadlines
- Where to go for help

Question? It's in the SPIT.

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**

*bold fields are required

- ☐ **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***

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

Some Words About 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

How To Participate

A step-by-step guide to a pain-free survey experience
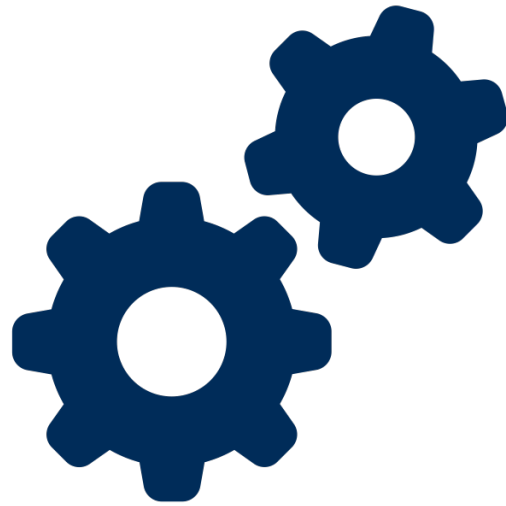
2022-23 Data Collection Dates

SEPTEMBER 1
Survey Participation and Information Templates (SPIT) posted to the CUPA-HR website.

NOVEMBER 1
Data collection opens. Survey invitation emailed to all data providers on file.

DECEMBER 23 – JANUARY 3
CUPA-HR closed for the holidays.

PUT THESE ON YOUR CALENDAR!

JANUARY 6
Data collection ends at midnight ET.

2022-23 Survey Schedule

Data Collection Opens	Data Collection Closes
Nov. 1, 2022	Jan. 6, 2023

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

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.

		Title	Administrators	Professionals	Staff	Faculty	Benefits
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

October Planning Guide

❑ **UPDATE** data providers for all surveys.

❑ **MATCH** position descriptions and CIP codes to incumbents using SPIT files.

❑ **COMMUNICATE** with the appropriate department early to prepare the required data in Institutional Basics.

November Planning Guide

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

❑**PREPARE** salary and demographic data upload files for each survey you're completing.

❑**ENTER** Benefits Survey data online.

❑Questions? **research@cupahr.org**

December Planning Guide

❏ **CONFIRM** template is formatted as stated in directions.

❏ **UPLOAD** your salary and demographic data for each survey.

❏ **RUN** PDF/Excel of data submitted and review data for accuracy.

❏ **RETURN** to Surveys > Survey Menu and check the box for each survey that reads "My institution has completed this survey"

❏ **RELAX** and enjoy the holidays! You're done!

January Planning Guide

❑ **DON'T PANIC!** You still have time, but the deadline is quickly approaching. Please don't wait until the last minute to upload your data.

❑ **UPLOAD** your salary and demographic data and resolve any errors. The system will identify the row number or column with the error.

❑ **REVIEW** the upload directions, make appropriate corrections, and upload your file again.

❑ **RESPOND** to inquiries from our research team on any questionable data points. Add @cupahr.org to your safe senders list.

❑ **POSITION SUGGESTIONS?** Complete New Position Suggestion Form.

What if I want to get started 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 2022-23 Updated 8/23/22								
2	*All data must be entered into Surveys Online by* January 6, 2023.								
3	**TABLE OF CONTENTS: SURVEY INFORMATION**								

15 RESEARCH MISSION

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!

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.

The positions in this survey are grouped into the following broad categories:
Academic Affairs
Athletics
External Affairs
Facilities
Fiscal Affairs
Information Technology
Institutional Affairs
Research, Statisticians and Data Scientists, and Health Science and Environmental Sustainability Professionals
Student Affairs

Upload Template

intref	positionid	salary	yearofentry	yearofbirth	gender	ethnicity	H1Bstatus	StateofResidence	facultystatus	systemlevel

Upload Directions

	A	B	C
1			**UPLOAD DIRECTIONS FOR FACULTY SURVEY**
2			*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.*
3			*Review the SURVEY INFORMATION tab for reporting dates, survey changes, and other important guidelines.*
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			• There are three methods of creating an upload file:
8			1) Use the UPLOAD TEMPLATE (preceding tab in this file).
9			2) 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. You will also need to duplicate the formatting in the data cells.
10			3) 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.
11			• Accepted File Types: Microsoft Excel (XLS, XLSX)
12			• 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
13			• 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.
14			• **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.**
15			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.**
16	**Column**	**Field Name (must be exactly as shown)**	**Content and Format**
17	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.**
18	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.**
19	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.**

			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
1			**CUPA-HR STAFF SURVEY POSITION DESCRIPTIONS 2022-23**		
2			The Staff Survey collects annual (12-month) salary data for 155 staff positions that are generally non-exempt and do not require a college degree. The annual salary for these individuals is the compensation they would receive for working 2080 hours in 12 months without overtime. SOC Crosswalks are provided to facilitate completion of IPEDS and other reporting, but these codes are not used in this survey.		
3			CHANGES TO THIS YEAR'S POSITIONS: No changes or additions this year.		
4	**Position Number**	**Title/Role**	**Position Description**	**2018 BLS SOC #**	**BLS Standard Occupation Code (SOC) Category Na...**
5	**Office and Clerical Staff; 506000 - 545000**				
6	506000	Administrative or Office or Clerical Lead	Performs a variety of administrative tasks, including answering telephones, typing or word processing, making copies of documents, and maintaining records. May also involve more technical work, but the general function is administrative in nature. These positions are functionally knowledgeable and often serve as the lead for a group of administrative support workers, assigning tasks, prioritizing, and coordinating activities as a backup to the supervisor. Report supervisors under 500000 in the Professionals Survey, whether exempt or non-exempt.	43-6014	Secretaries and Administra... Assistants, Except Legal, Med... and Executive
7	511000	Executive Assistant	Provides administrative support to management and upper-level administrators by compiling information and preparing reports, handling information requests, and performing relevant administrative support functions. May also oversee lower-level office support staff. *Report here positions that do not meet the FLSA administrative exemption criteria.*	43-6011	Executive Secretaries and Administrative Assistants...
8	512000	Accounting Assistant or Financial Clerk	Matches invoices to purchase orders or vouchers; performs data entry, recordkeeping, and customer service; and processes financial transactions in support of the accounts payable or accounts receivable function.	43-3031	Bookkeeping, Accounting, a... Auditing Clerks
9	512010	Accounting Unit Lead	Assigns tasks, prioritizes, and coordinates the work of accounting assistants. Report supervisors under 430160 in the Professionals Survey.	43-3000	Financial Clerks
10	514000	Administrative Assistant	Performs administrative and office support activities; may support faculty, professionals, or a team; performs word processing; creates spreadsheets and presentations; files, and handles basic correspondence. Titles may include administrative associate, administrative support coordinator, and similar.	43-6014	Secretaries and Administra... Assistants, Except Legal, Med... and Executive
11	516000	Cashier	Handles payments from customers purchasing goods and services, typically in a retail setting such as a dining facility, bookstore, or market. Report accounts payable cashiers, such as those receiving payments in student accounts payable functions, under 512000.	41-2011	Cashiers
12	520000	Clerk, Materials	Serves to provide office and clerical support in a stockroom, warehousing, or shipping and receiving environment. Records stock and shipment data; completes shipping and receiving reports; reports damages and discrepancies for accounting, reimbursement, and recordkeeping.	43-5071	Shipping, Receiving, and Inve... Clerks
13	522000	Clerk, Records	Serves as a dedicated resource for recordkeeping (e.g. student records, medical records, personnel records, etc.), data collection, and responding to customers as requested for related information. May have title of file clerk, records clerk, or records assistant. Typically ensures compliance with applicable policies and regulations.	43-4000	Information and Record Cle...
14	523000	Mailing Coordinator	Coordinates bulk mailing and other mailings for on and off-campus clients; may oversee campus mail distribution, and may supervise student workers.	43-9050	Mail Clerks and Mail Mach... Operators, Except Postal Ser...
15	524000	Communications or Switchboard Operator	Receives and transmits routine and emergency telephone and radio traffic; dispatches and coordinates police, fire, animal control, and other municipal services; maintains and processes a variety of communications paperwork, records, and logs. Titles may include switchboard operator, telecommunicator, or dispatcher.	43-2011	Switchboard Operators, Inclu... Answering Service
16	528000	Customer Service Assistant	Interacts with customers to provide information in response to inquiries about processes, products, or services; handle and resolve complaints; or refer complex matters to professional or managerial staff.	43-4051	Customer Service Representa...
17	530000	Department Assistant	Provides a variety of administrative support to assigned administrator and department; establishes, maintains, and ensures compliance of department records; assists with budgetary matters; tracks department funds and purchasing; compiles reports; and monitors assigned projects and program components. May handle a variety of clerical, student support, and facility coordination duties.	43-6014	Secretaries and Administra... Assistants, Except Legal, Med... and Executive

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		Surveys open for data collection			Tuesday, November 1, 2022			
14		Data collection ends			Friday, January 6, 2023			
15		Effective date for data			Tuesday, November 1, 2022			
16	**IMPORTANT LINKS**							
17		Participation Information			https://www.cupahr.org/surveys/survey-participation/			
18		Update Data Providers			https://www.cupahr.org/surveys/survey-participation/			
19		Results			https://www.cupahr.org/surveys/pricing-and-ordering/			
20		About/Ask Research			https://www.cupahr.org/surveys/about-research/			
21	© Copyright 2022 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.							

Institutional Basics

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	COMPLETE INSTITUTIONAL BASICS															
2	Institutional Basics can be accessed through any survey on Surveys Online. Data entered in this section are visible to those at your institution responding to each of our surveys. If someone else has already entered data, please review and answer any unanswered questions. If you disagree with any existing entries in Institutional Basics, first consult the party at your institution who supplied the original data entries before editing. For assistance in identifying that party, write research@cupahr.org.															
3	REQUIRED INFORMATION IN INSTITUTIONAL BASICS MUST BE COMPLETED BY SOMEONE AT YOUR INSTITUTION BEFORE YOU CAN CHECK ANY SURVEY COMPLETE AND BE COUNTED AS A PARTICIPANT															
4	The tables below contain all the data you will be providing for the Institutional Basics section. **Please note that these tables are not uploadable.** They are provided for your convenience as a means for gathering this data (perhaps from another department or before surveys are open). You will need to enter any data in these tables in Surveys Online.															
5	1. Total Expenses Reported to IPEDS IN THE 2021-22 Spring Finance Survey (REQUIRED)															
6																
7		$														
8																
9	2. Fall 2022 Student Enrollment															
10	Report fall student enrollment as of your institution's official fall reporting date or October 15. If it is not possible to use this date, use a reporting date no earlier than September 15 and no later than November 1. Your Institutional Research Office is likely to be the best source for this data.															
11	Please complete rows a, b and c if you can. FTE enrollment should always be less than or equal to (if PT=0) FT + PT students combined.															
12	If you can complete rows a and b, but not c, enter these numbers and then hit the "Calculate" button in Surveys Online. FTE figures will be derived as: Number of Full-Time Students + 1/3 the Number of Part-Time Students.															
13	If you can only provide numbers for row c, please do so. In this case, do not hit the "Calculate" button.															
14	If your institution does not have a particular type of student (graduate or undergraduate), enter 0 in row c.															
15																
16						Undergraduate		Graduate								
17	a. Number of full-time students															
18	b. Number of part-time students															
19	c. Full-Time-Equivalent (FTE) enrollment (REQUIRED)															
20																
21	3. Fall 2022 Faculty Size (as of November 1, 2022)															
22	Report the headcount number for each faculty type in rows a through c. If your institution does not have a particular type of faculty, enter 0 in that row.															

Check EACH Survey Completed

PRINT

Print a PDF or Excel export of the data you've entered in each survey.

Verify all data is correct.

TRANSMIT

Check (✓) the survey status box that reads "My institution has completed this survey". This will transmit your data. **You are not done until this box is checked.**

CONFIRM

The system will email you a confirmation message when you check 'Done' and again when we've accepted and cleaned your data.

TIPS AND TRICKS

TIME SAVER

Export last year's survey data and update for 2022-23 incumbents.
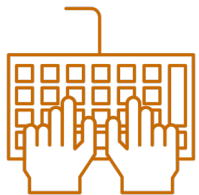
UPLOADS

'Will Complete' must be checked on the Survey Menu to unlock the upload option.

GETTING ACCESS

Changes to survey access must be completed in our Data Provider Management Tool.

REMEMBER

To prevent errors, upload formatting must match EXACTLY as shown in the Upload Directions.

How We Communicate With You

Surveys Online

Email to CHRO

Email to data provider

CUPA-HR eNews & website

How to Contact the CUPA-HR Research Team

Ask Research

Attach your file

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

CUPA-HR Webinar

Have a Question?

research@cupahr.org

Jackie

Diana

Jennifer

Kate

Suzi

Melissa