



EAA Survey Hosting and Co-sponsoring Guidelines

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EAA National Surveys – Schedules and Subscription Fees

NATIONAL EXECUTIVE COMPENSATION SURVEY	
Host Association: HR Source	
Questionnaire: January	Report: May
Host association collects data, cleans data, prepares report:	
▶ 1-75 participants	\$790 Base + \$15/participant
▶ Over 75 participants	\$790 Base + \$10/participant
NATIONAL IT & ENGINEERING COMPENSATION SURVEY	
Host Association: MRA	
Questionnaire: May	Report: September
Host association collects data, cleans data, prepares report:	
▶ 1-75 participants	\$790 Base + \$15/participant
▶ Over 75 participants	\$790 Base + \$10/participant
NATIONAL SALES COMPENSATION SURVEY	
Host Association: MRA	
Questionnaire: July	Report: November
Host association collects data, cleans data, prepares report:	
▶ 1-75 participants	\$790 Base + \$15/participant
▶ Over 75 participants	\$790 Base + \$10/participant
NATIONAL POLICIES & BENEFITS SURVEY <i>(conducted in alternate years)</i>	
Host Association: HR Source	
Questionnaire: August	Report: March
Host association collects data, cleans data, prepares report:	
▶ 1-75 participants	\$790 Base + \$15/participant
▶ Over 75 participants	\$790 Base + \$10/participant
NATIONAL BUSINESS TRENDS SURVEY	
Host Association: Cascade	
Questionnaire: September	Report: November
Association Base Cost: Administration, Data cleaning, & Analysis:	\$375/flat fee
NATIONAL WAGE & SALARY SURVEY <i>(compiled data from local surveys)</i>	
Host Association: MRA	
Questionnaire: October	Report: December
Association Base Cost: Administration, Data cleaning, & Analysis:	Compiled data/flat fee \$375

Guidelines for Selling National Surveys

Associations who co-sponsor a survey are authorized to re-sell it as follows:

- For any price to its own members or non-member participants that it has a previous established business relationship (free or otherwise).
- For a fee that is at or above the base co-sponsor fee to non-participants using the chart below. The co-sponsor fees defray some but not all the actual labor costs incurred by the host association to produce a national survey. This protects the value of membership and the EAA brand.

National Survey	Non-participant fee at or above the base fee
National Executive Compensation Survey	\$790
National IT & Engineering Compensation Survey	\$790
National Policies & Benefits Survey	\$790
National Sales Compensation & Practices Survey	\$790
National Wage & Salary Survey	\$790
National Business Trends Survey	\$375

Associations who do not co-sponsor a survey cannot re-sell the survey, but can contact the Host Association as follows:

- If your association did not co-sponsor a survey, but has a member who wants to purchase it, contact the Host Association to make arrangements. As a courtesy to a sister EA, the host association will provide the survey to your member at its own member fee (a considerable savings for your member over the non-member fee).
 - This only applies to a one-time member purchase; it is not a substitute for co-sponsoring a survey for your members.
- If your association did not co-sponsor the survey and a non-member contacts you, please refer these requests to the Host Association who will handle the transaction.

Guidelines for Collecting Comparable Data through a Local Survey Instrument for Inclusion in a National Survey

In 2012, the National Survey Committee addressed the need to expand the methods of data collection from using only the national survey instrument to allowing comparable data to be gathered in a local survey and then submitted for inclusion in a national survey. This is being done to accommodate the growing trend of associations to combine all their jobs into one survey to simplify participation for their members. An association can collect data through the local survey instrument and submit it to the national surveys when the following best practice guidelines are met:

- a) **The local survey must use the same job descriptions, titles, and levels used in the national survey.**
- b) **The local survey must gather comparable base salary and bonus pay data in the same manner as the national survey.** For example, if the national survey gathers base salary and variable pay, and the local survey only gathers base salaries, the local data cannot be used in the national survey as it would skew the results.
- c) **The local survey must gather comparable demographic breakout data as the national survey.** The local survey may publish fewer or more demographic breakouts locally if the cell boundaries that are used to collect data match the national survey demographics. See the next section for an explanation of how this works and for the required demographic cell boundaries.
- d) **Although encouraged to do so, associations are not required to collect benefits or other supplemental questions** in the national surveys to be eligible to submit salary data. Note: Each host association will prepare a list of required benefits / supplemental questions that must be asked to ensure the national surveys contain comparable data.
- e) The association that gathers comparable data as outlined above through its local survey instrument **must contact the host association to obtain the required spreadsheet format for submission of their data** for inclusion in the national survey.
- f) **Data must be collected within the last 12 months** and it should be **aged to the survey effective date**. *Examples of sources that can be used to age data include: World at Work, BLS, local Pay/Merit Increase Surveys, etc.*
- g) **It is preferred, though not required, that associations provide incumbent data.** If the local survey collects averages, co-sponsors should provide the host association with data where there was only 1 incumbent in a position or only provide 1 salary where there is more than 1 incumbent (do not copy and paste the same salary repeatedly to equate to the number of incumbents).

The local data cannot be used unless comparable data as outlined above are collected.

National Surveys and Standard Demographics Established by the EAA National Survey Committee

During 2012 the National Survey Committee decided to establish common demographic breakouts for the national surveys. This is consistent with the decision made several years ago to use common benchmark job descriptions. The benefits of having common demographics:

- Further strengthens the EAAs ability to provide consistent national data.
- Members with locations in different states will be able to get comparable data.

By using common demographics, the data can be compiled (rolled up) as needed in the national surveys. The benefit of **collecting consistent demographics is that associations do not have to buy into a single approach for their reports**. How your association reports the demographics in your local survey reports is up to you and what is a best fit your members **if the cell boundaries match the national demographics**.

The following pages:

- Outline the demographics that are being used in the national surveys (as of 2012),
- Provide examples of how - at the local level - associations can aggregate data in any way that fits their membership in its local report.

A. Industry Breakouts

Natural Resources / Mining
Utilities
Construction
Non-Durable Goods Manufacturing
Durable Goods Manufacturing
Retail Trade
Wholesale Trade
Transportation / Warehousing
Information (Communication/Broadcasting)
Financial Activities (<i>includes Banking, Insurance, Real Estate</i>)
Professional / Business Services
Education Services
Health Services
Social Services
Leisure / Hospitality Services
Services, not elsewhere classified
Public Administration

National Surveys and Standard Demographics Established by the EAA National Survey Committee *(Continued)*

B. Profit Status and Public Sector Breakouts

Health Services, Social Services, Utilities as well as some Education Services are non-profit in many cases. To avoid potential overlapping responses, non-profits should be reported in their correct industry above.

Adding a separate profit status question to your local surveys enables you to breakout the data for national surveys while keeping the industry categories intact.

For Profit
Not-for-Profit
Public sector government

C. Employee Breakouts

Associations can use different employee breakouts if the cell boundaries match the boundaries shown below for the national surveys.

For National Surveys Employee Count	<u>Local Survey</u> Example 1: Cell boundaries match	<u>Local Survey</u> Example 2: Cell boundaries DO NOT match (red font)
1-24	1-24	1-24
25-49	25-49	25-49
50-74	50-74	50-74
75-99	75-99	75-99
100-199	100-199	100-199
200-499	200-349	200-449
	350-499	
500-999	500-749	450-799
	750-999	
1,000 or more	1,000 or more	800 or more

TIP: The easiest way is to collect the actual number of employees. Then each association can present the employee breakouts they wish to use and can also submit to the national surveys in a way that can be used.

National Surveys and Standard Demographics Established by the EAA National Survey Committee *(Continued)*

D. Revenue Breakouts

The table below shows that the National Executive Survey (first col) will have more revenue breakouts than the other National Surveys. The Executive Survey with participants and rates that are very revenue sensitive has nine revenue groups. The other national surveys have five revenue groups. If needed, we can recombine (rollup) the smaller breakouts so the sample size is large enough.

The next three columns show examples of how revenue breakouts used to gather local data would be eligible or ineligible for submitting to a national survey.

Local Survey Examples 1 and 2 are workable options that allow locally collected data to be aggregated and included with national surveys (except the Executive Survey) without compromising the summary by revenue. Local surveys can provide a different number of revenue cuts so long as they can be aggregated into a national survey without overhanging cell boundaries.

Local Example 3 cannot be aggregated to match national survey data because the cell boundaries for the revenue group labeled B overhang the national survey cell boundaries. As a result, this data cannot be used in the national surveys. This could be remedied by adding a revenue cut at \$25MM to \$49.9MM.

<u>National Executive Survey</u>	<u>National Surveys</u> -IT & Eng -Sales	<u>Local Survey Example 1:</u> Cell boundaries match	<u>Local Survey Example 2:</u> Cell boundaries match	<u>Local Survey Example 3:</u> Cell boundaries do NOT match (overhang)
\$0 – 4.9MM	A	A	A	A
\$5 – 9.9MM		A	B	A
\$10 – 14.9MM		B	B	B
\$15 – 24.9MM		B	C	B
\$25 – 49.9MM	B	C	D	B
\$50 – 99.9MM	C	D	E	C
\$100–249.9MM	D	E	F	D
\$250– 499.9MM	E	F	G	E
\$500MM+			G	F

The mix of participant company size in local surveys will tend to limit and define the natural survey breaks. Local Example 1 shows that a local break at \$9.99MM has been chosen as a best fit. Later, data from cells labeled A and B can be combined and reported in a revenue breakout that matches one of the national surveys.

Tip: If local data are collected with exact revenue it can be recalculated in any configuration and can be combined with national data.

National Surveys and Standard Demographics Established by the EAA National Survey Committee *(Continued)*

E. Geographical Region Breakouts

There are several different geographical regions that may be collected and/or reported in the national reports. These could include zip code, state, county, metropolitan statistical area, etc. Local data can be utilized in a national survey if it is submitted in accordance with the geographic regions found in the EAA national survey.

Host Association Responsibilities

The responsibilities of the hosting association (as identified on page 2) include:

- Provide feedback and make recommendations to national survey committee including but not limited to content, survey platform, data collection process, report format/breakouts, data integrity issues, etc.
- Address concerns related to pricing and cost, survey compositions and administration logistics.
- Solicit co-sponsorship of current members of the EAA in order to gain a strong representation of national data.
- Provide timeline, associated costs, questionnaire links and periodic participation updates; sample messaging available upon request.
- All data will be cleaned on a national level including those submitting from their local survey. Should questions arise regarding data provided, host association will contact the participant and/or co-sponsor for clarification.
- Data is analyzed, summarized and final report in PDF format provided to all co-sponsors.
- Should there be the need, full report will be reissued to all co-sponsors for instances where data and final report needed modifications, corrections or updates.
- Final participation rates and billing/invoices sent out once final report is published.
- Maintain a minimum of 3 years of survey data in order to respond to member inquiries based upon the technical capabilities of the platform in a reasonable timeframe.
- Retain survey data in accordance with industry privacy data standards.
- In accordance with the EAA asset retention policy, host associations are periodically required to produce archive copies at the direction of the EAA Executive Board.

Specific geographic cuts may available at an additional fee. Please contact host association.

EAA Survey Branded Cover and Naming Conventions

Utilizing the EAA branded cover: The survey cover page includes a place to add your association's logo and identification to the cover. The remaining EAA identifying logo and page design is to be used as presented as a means of establishing and promoting the EAA brand.

A decision was made to name surveys with the year the survey data will be used. This is a marketing issue for surveys published near the end of the year as the data that will be used the entire next year. For example, a survey that is published in Dec 2020 will be titled 2021 so it does not sound dated when it is published.

National Survey Committee Membership – How to Join

The National Survey Committee has two types of members:

1. The Host Associations for each of the six national surveys are permanent members of the committee.
2. Members at large can be from any association and can either be nominated or appointed in accordance with the EAA National Research and Survey Committee bylaws.

This is a committed working committee that meets via conference call typically on a monthly basis. We welcome new additions to the committee. If interested, please contact one of the current members listed on the cover.