

BalancedComp

2019 Salary & Incentive  
Survey Questions



# Intro

## Tell us about yourself

- First Name
- Last Name
- Email
- Phone

## Where do you work

- Institution Name
- Assets (In Millions)
- Industry
- State
- County
- Organization FDIC or NCUA Certificate Number
- Organization RSSD ID
- Job Title

How many physical branch locations does your organization have?

# Payroll

How many total (full-time & part-time) employees does your organization employ?

# HRIS / Payroll

What Human Resource Information System (HRIS) does your organization use?

What payroll system does your organization use?

## PTO – Non-Exempt

**How many PTO (sick plus vacation, not including holidays) days are non-exempt employees offered with less than 1 year of service?** (Respond with the maximum amount for the timeframe provided)

**How many PTO (sick plus vacation, not including holidays) days are non-exempt employees offered with 1-3 years of service?** (Respond with the maximum amount for the timeframe provided)

**How many PTO (sick plus vacation, not including holidays) days are non-exempt employees offered with 3-5 years of service?** (Respond with the maximum amount for the timeframe provided)

**What is the maximum number of PTO (sick plus vacation, not including holidays) days a non-exempt employee can receive in a year?**

## PTO – Exempt

**How many PTO (sick plus vacation, not including holidays) days are exempt employees offered with less than 1 year of service?** (Respond with the maximum amount for the timeframe provided)

**How many PTO (sick plus vacation, not including holidays) days are exempt employees offered with 1-3 years of service?** (Respond with the maximum amount for the timeframe provided)

**How many PTO (sick plus vacation, not including holidays) days are exempt employees offered with 3-5 years of service?** (Respond with the maximum amount for the timeframe provided)

**What is the maximum number of PTO (sick plus vacation, not including holidays) days an exempt employee can receive in a year?**

## Turnover

What was your organization's total turnover percentage for 2018? Use the formula: (2018 voluntary + 2018 involuntary terms) ÷ (2018 average employee count)

What was your organization's NON-EXEMPT turnover percentage for 2018? Use the formula: (2018 non-exempt voluntary + 2018 non-exempt involuntary terms) ÷ (2018 average employee count)

What was your organization's EXEMPT turnover percentage for 2018? Use the formula: (2018 exempt voluntary + 2018 exempt involuntary terms) ÷ (2018 average employee count)

## Benefits – Health

What percentage of the total premium does the organization contribute toward an individual health insurance policy for an employee?

What percentage of the total premium does the organization contribute toward a family health insurance policy for an employee?

## Budgeting

Do you prorate merit increases for employees working for the organization less than 1 year?

Does your organization pay out a lump sum payment when an employee is paid at/over the maximum of the salary range?

- Yes
- No, they do not receive anything
- No, they still receive a merit increase even if paid over the maximum of the range
- No, they still receive a merit increase because we don't have stated salary ranges

What was your organization's average salary increase percentage from your 2018 merit labor budget?

What was your organization's average NON-EXEMPT salary increase percentage from your 2018 merit labor budget?

What was your organization's average EXEMPT salary increase percentage from your 2018 merit labor budget?

What is your organizations actual/projected average salary increase percentage for your 2019 merit labor budget?

What is your organization's actual/projected average NON-EXEMPT salary increase percentage from your 2019 merit labor budget?

What is your organization's actual/projected average EXEMPT salary increase percentage from your 2019 merit labor budget?

## Benefits – Retirement

Does your organization offer a 401(k)?

If yes to the last question, what is the maximum percentage of base pay the organization will match?

Does your organization offer a Roth IRA?

Does your organization offer a supplemental executive retirement plan (SERP)?

- Yes
- No
- No, but we intend to look into this in 2020

**If yes to having a SERP, how many employees are participating in the SERP? (Including the CEO)**

**If yes to having a SERP, what is the estimated dollar payout intended for the CEO?**

- N/A
- <\$250k
- \$250k - \$500k
- \$500k - \$999k
- \$1m - \$1.5m
- >\$1.5m

**If yes to having a SERP, what is the estimated average dollar payout intended for the other executives? (excluding the CEO)**

- N/A
- Only the CEO is eligible
- <\$250k
- \$250k - \$500k
- \$500k - \$999k
- \$1m - \$1.5m
- >\$1.5m

**How is your SERP paid out?**

- N/A
- Installments Paid Out Until Death
- Installments Over a Period of Years
- A Lump Sum

**If yes to offering a supplemental executive retirement plan (SERP), what type of plan is it?**

- N/A
- Split Dollar
- Defined Benefit
- Defined Contribution
- Other

# Incentives, Commissions, & Bonuses

Does your organization have a corporate incentive/bonus plan in place for 2019?

If you answered yes to the previous question, who is eligible to participate in the corporate incentive/bonus plan?

- N/A
- Everyone
- Non-exempt
- Exempt
- Executives
- Exempt & Executives
- Other

What percent of the overall payroll budget was awarded as variable pay (commissions, incentives & short term bonuses) in 2018? Use the formula: (2018 total variable pay paid out ÷ 2018 total payroll budget)

# Gender Pay Equity

Did your organization analyze for pay equity issues in 2018?

- Yes
- No
- No, but we plan to in 2019

If yes to the prior question, did your organization make any wage corrections based on the analysis?

# Importing

## What needs to be included?

Just wages and job titles for each employee - no names necessary!

## What should I include for Incentive Pay?

Cash Compensation provided to an employee, separate from base pay, based on performance, which is thought to entice the employee to continue delivering positive results. Incentive pay may come in the form of a bonus, profit-sharing, or commission. (Please only report payouts made in 2018)

## Wages Combined in One Column & Incentive Combined in One Column

Position	Salary	Total Incentive Pay
Teller	\$10.30	\$300.00
Teller	\$15.00	\$600.00
Teller II	\$10.60	\$250.00
Branch Manager	\$24.04	\$100.00
CFO	\$130,000.00	\$10,000.00

## Wages in Two Columns & Incentive Data in Multiple Columns

Position	Hourly	Annual	Christmas Bonus	Referral Bonus	etc .
Teller	\$10.00	\$20,800.00	\$100.00	\$200.00	etc.
Teller	\$10.30	\$21,424.00	\$200.00	\$400.00	etc.
Teller II	\$10.60	\$22,048.00	\$50.00	\$200.00	etc.
Branch Manager	\$24.04	\$50,000.00	\$100.00	\$0.00	etc.
CFO	\$62.50	\$130,000.00	\$10,000.00	\$0.00	etc.