

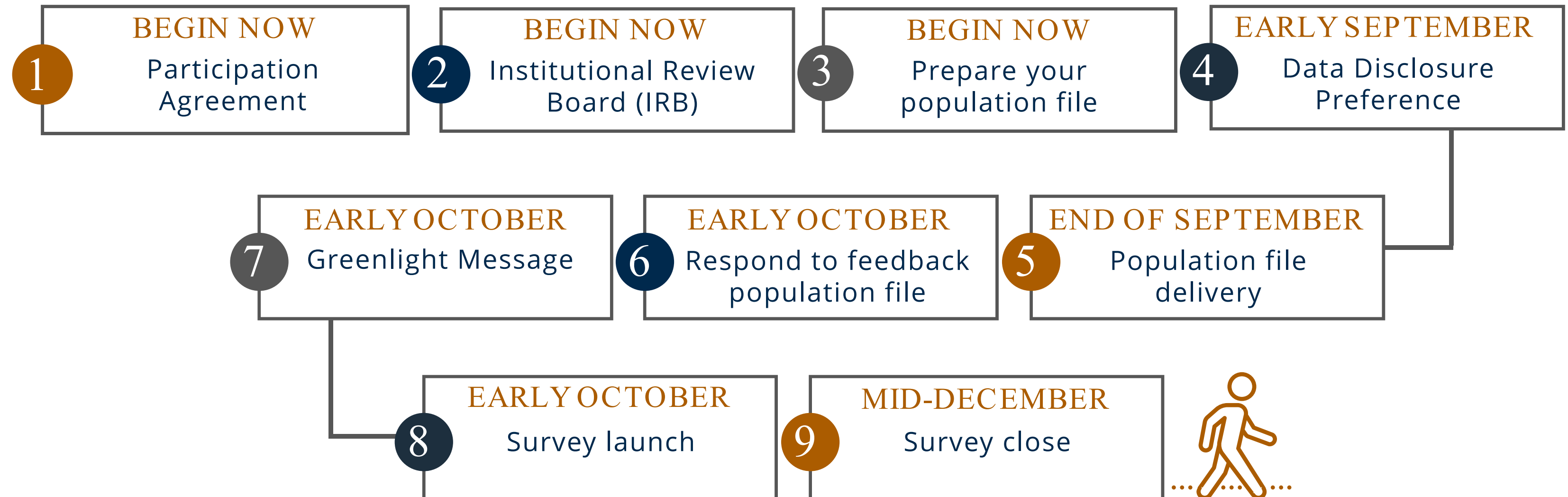
Ramping up for the Faculty Retention & Exit Survey Administration



collaborative on academic
careers in higher education

Faculty Retention & Exit Roadmap

What does survey administration look like?



*Refer to [Exit Survey Partner Tool Kit](#) for more detail in formation

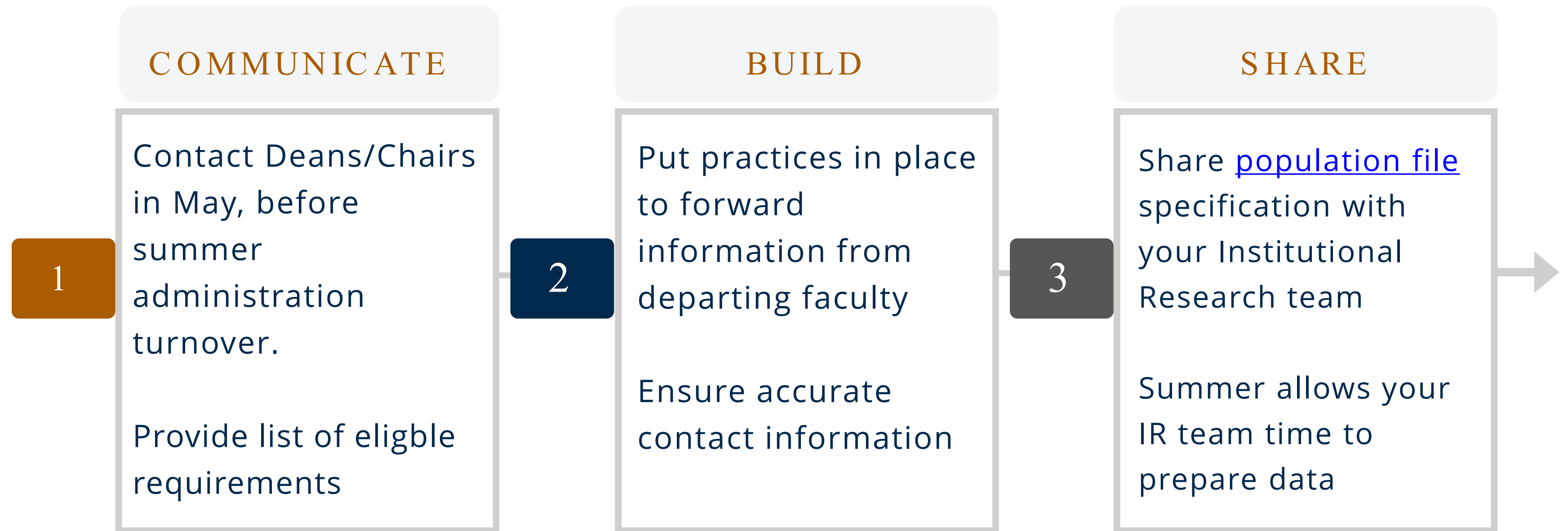


Preparing Your Population File



Population File Preparation

Where to begin?



*Refer to [Exit Survey Partner Tool Kit](#) for more detail in formation

Survey Eligibility Requirements

What information to gather?



- **Appointment types**
 - Tenure-track full-time assistant, associate and full professors
- **Employment status**
 - Departures
 - Retentions
 - Pre-emptive retentions
- **Separation types**
 - Voluntary resignations
 - Retirements who go on to continued full-time employment in the academy (if known)
- **Optional**
 - Non-tenure track full-time faculty

Do Not Include!

What should not be a part of the file?



- Faculty in terminal year after being denied tenure
- Senior administrators
 - Dean, Assistant Dean, Associate Provosts
 - (Chairs may be included)
- “Natural” retirements – not engaged in comparable employment elsewhere
- Involuntary separations
- If faculty departed or retained prior to July 1 of the most recent academic year (even if official separation date falls within eligible window)

Population File Variables

What variables should I pay attention to?



- (R)equired variables are critical for building COACHE reports.
- (I)mportant variables are helpful.
- (O)ptional variables are useful for potential outside research.

*Refer to [Exit Survey Partner Tool Kit](#) for more detail in formation



Key Required Variables

What variables must be included in my file?



- **Localid** – unique identifiers (NOT social security numbers)
- **E-mail**
- **Demographic data** (race, gender, citizen, rank, tenure)
- **Acarea** or COACHE “Academic Area” code
- **New institution**

*Refer to [Exit Survey Partner Tool Kit](#) for more detail in formation

Population File Timeline

Milestones and Target Completion Dates

MAY

Reach out to Deans/Chairs with list of eligibility requirements



JUNE

Share aggregated list and population file parameters with Institutional Research team.



JUNE

Have IR team build test population file and conduct audit.



JULY

Return preliminary list of faculty departures and population file variables to Deans/Chairs for review and edit.



AUGUST

Find and remove ineligible faculty on the list. File should be reviewed by representative from Provost's Office.



SEPTEMBER

Ask IR to run final audit and submit file to COACHE by end of the month



*See sample Exit [population file](#)



Pass Through Variables

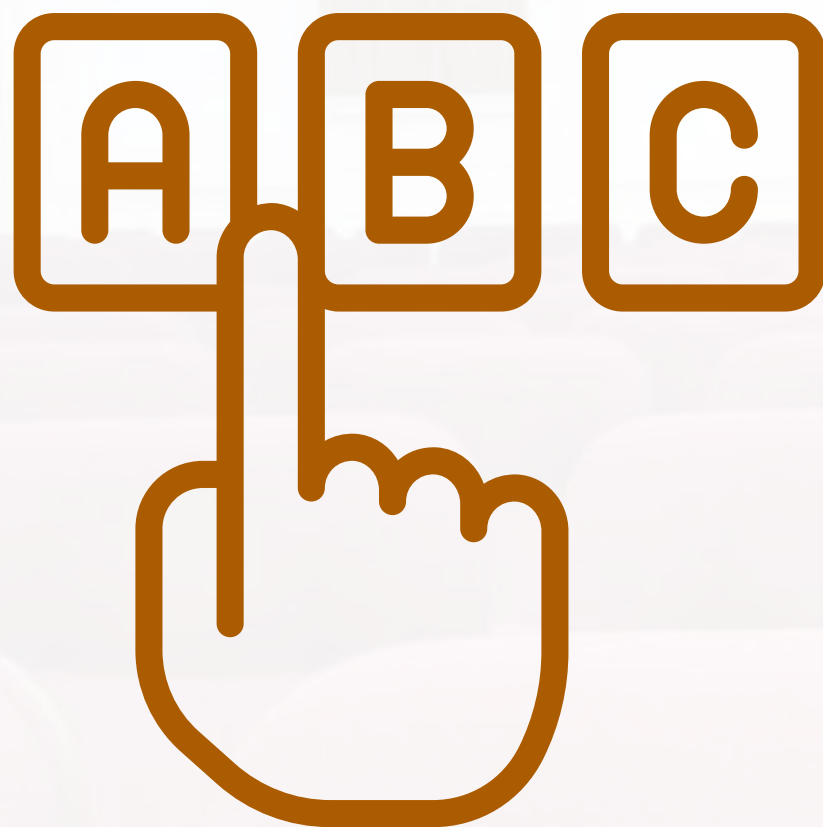
Why would I use pass through variables?



- \$100 per variable
- Data is appended to the population file and is passed through into the unit record data file
- You must receive unit record data
- No identifying information

Data Disclosure

What data disclosure options do I have?



Option #1: Not receiving unit record data

Advantages:

- Confidentiality
- Reduced workload for IR staff

Disadvantages:

- Outsourcing of custom analysis
-

Option #2: Receiving unit record data

Advantages:

- flexibility with analysis
- Data Sharing Consortia (AAUDE, COFHE, HEDS)

Disadvantages:

- Data management and security
- Risk of lower response rate

Statement of Data Confidentiality

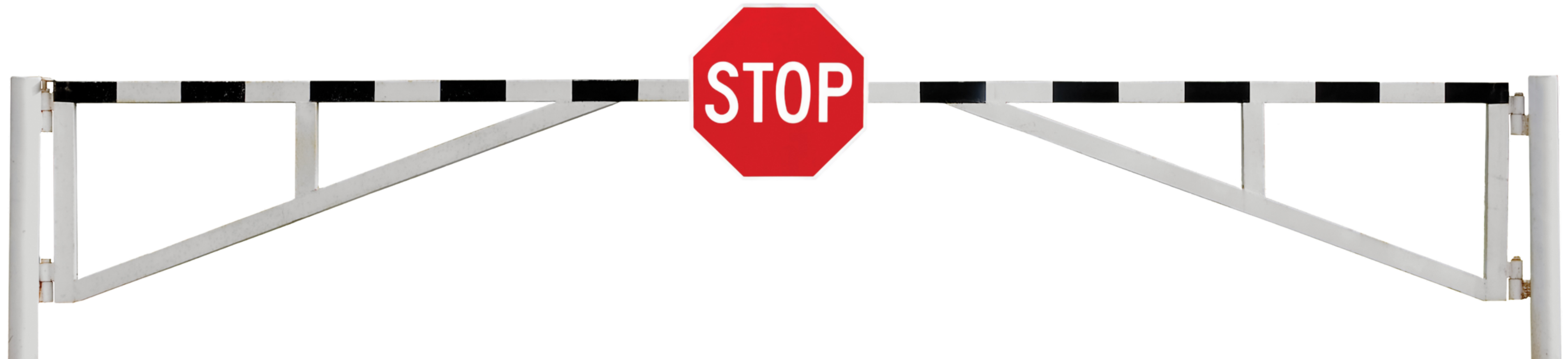
Who should sign the data confidentiality form?



- Statement of data confidentiality must be signed by a data administrator!
- Data administrator must **NOT**:
 - ✓ Be in a position to make or influence faculty personnel decisions at the institution
 - ✓ In cases of promotion and/or tenure, be involved in deliberations and votes of the committee regarding such cases for a period of two (2) years following receipt of the COACHE Data File and Reports
 - ✓ Distribute any survey results in which identification of individuals may be possible.

IRB Approval

Speak with a representative of your Institutional Review Board (IRB) to determine if review is necessary. Although COACHE has obtained approval from Harvard's Committee on the Use of Human Subjects, your local IRB may require you to complete additional forms.



*Harvard's Committee on the Use of Human Subjects [approval letter](#) copy

Your COACHE Partner Portal



Here is the information we currently have on file for your institution's upcoming survey administration. If you need to change anything, please do so in the tabs below.

- You do not have to complete all of the tabs at once.
- You can return to this form at a later date to provide further information - just ensure you save your form when finished making edits and you are ready to end your session.
- To save your form, go to the "Save" tab.

Edits you make on one tab will be retained as you navigate through the Portal. You only need to save the form on the "Save" tab once when you are ready to end your current session.

Contacts | Unit Level Data | IRB Approval | Current Documents | Documents | Save

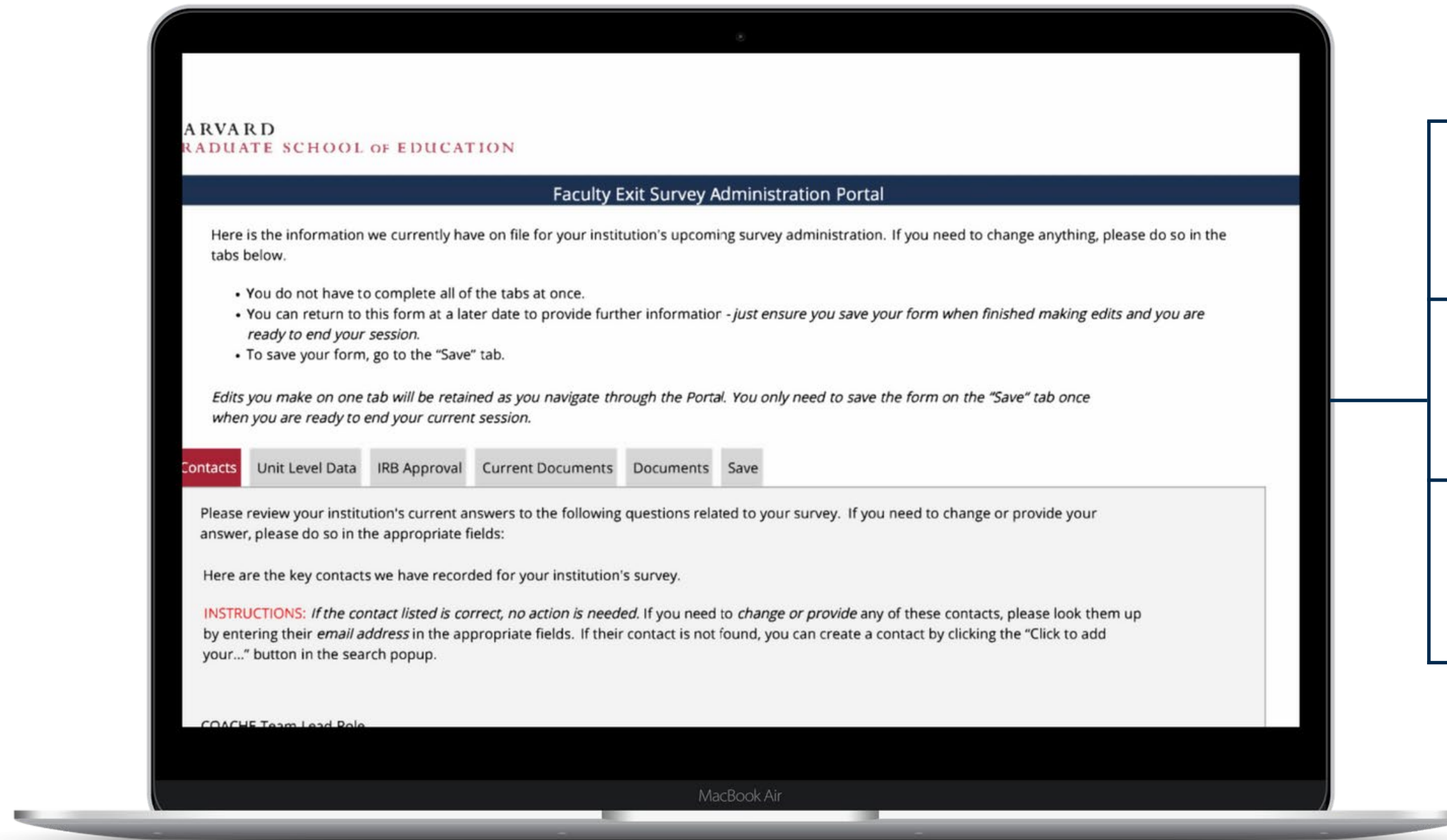
Please review your institution's current answers to the following questions related to your survey. If you need to change or provide your answer, please do so in the appropriate fields.

Here are the key contacts we have recorded for your institution's survey.

INSTRUCTIONS: If the contact listed is correct, no action is needed. If you need to change or provide any of these contacts, please look them up by entering their email address in the appropriate fields. If their contact is not found, you can create a contact by clicking the "Click to add your..." button in the search popup.

COACHE Team Lead Role
This person will be most directly responsible for engaging your faculty and team in survey preparation and dissemination efforts, and for meeting milestones leading up to survey administration. Typically, this contact is a person in the office of academic affairs whose work addresses issues pertaining to faculty policies, resources, climate, and governance.

COACHE Faculty Retention & Exit Portal



Upload your team contacts



Store your documents and population file(s)



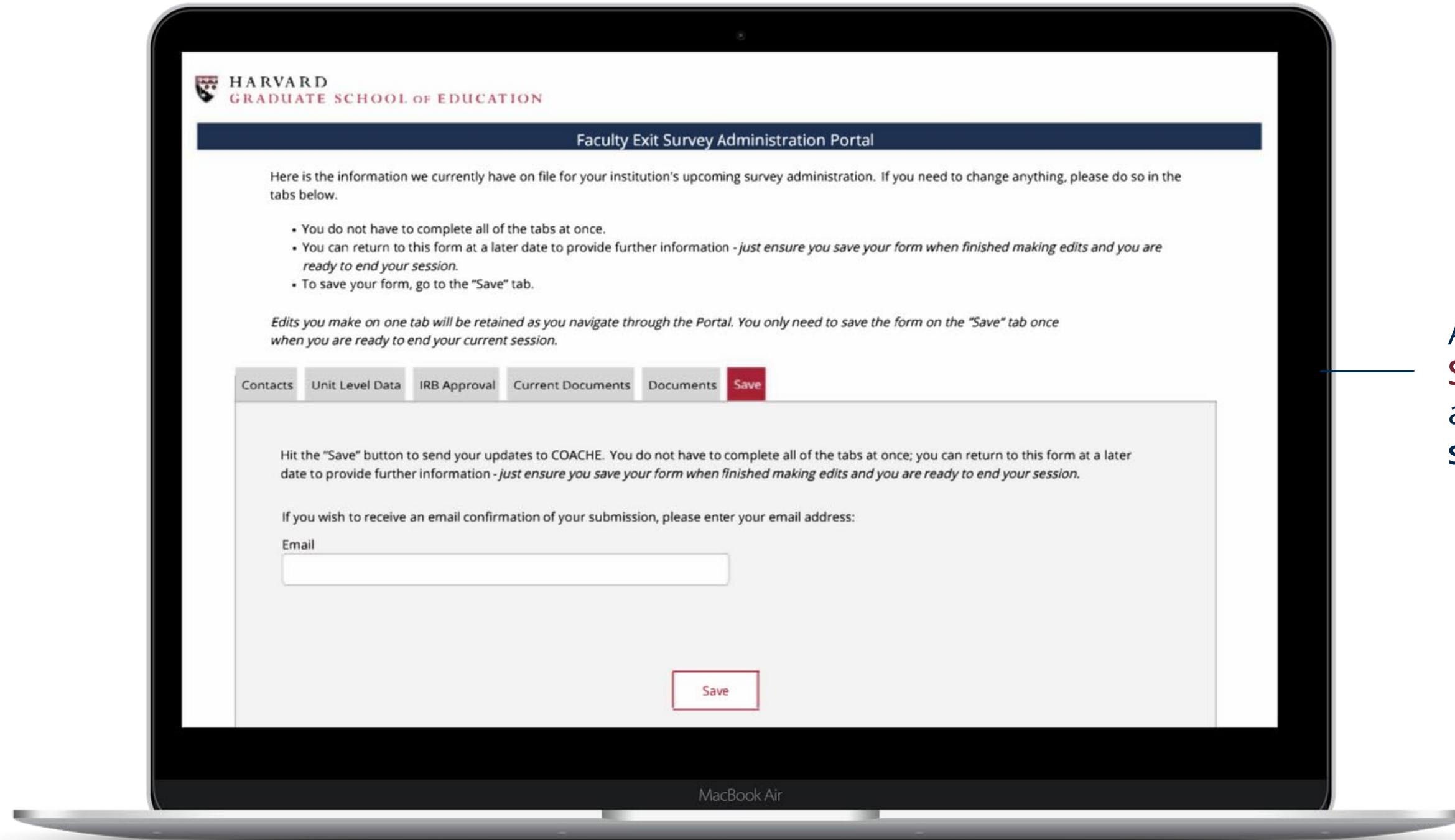
Securely share documents with COACHE team



Make institution-specific survey decisions within the partner portal



COACHE Faculty Retention & Exit Portal



Always click the **SAVE** button after each session



LEARN MORE

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For additional information on preparing for your COACHE Faculty Retention & Exit survey, contact:



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