

## BUILDING YOUR MASTER POPULATION FILE

---

The file that you deliver to COACHE in advance of the survey allows us to reach eligible faculty and gives us information critical to analyzing the results and understanding patterns of nonresponse.

### Eligible Survey Population

*Include the following appointment types:*

- Full-time faculty who have been employed at your institution for at least a year prior to departure or retention.

*... with the following employment status:*

Faculty who, between July and June of the prior academic year:

- Were employed at your institution but no longer employed at the start of the current academic year (the “departures”)
- Renegotiated terms of employment as a result of an outside offer (the “retentions”)
- Received preemptive retention actions (the “preemptives”) without presenting an outside offer, if known

*... and the following separation types:*

- Voluntary resignations
- Retirements who go on to continued full-time employment in the academy (if known)

*Do not include:*

- Faculty in their terminal year after being denied tenure
- Senior administrators, e.g., Dean, Assistant Dean, Associate Provost (but chairs may be included)
- “Natural” retirements, that is, who are not engaged in comparable employment elsewhere
- Involuntary separations (including confidentially negotiated settlements and tenure denials)
- Faculty who were retained or departed prior to July 1 of the most recently completed academic year (2024- 25), even if their official separation date may be within the eligible range. Faculty are only eligible for the survey if they left or decided to stay within the eligibility window (i.e., between July and June of the prior academic year).

### Format and content:

Prepare the database in Excel format and only include faculty who meet the above eligibility criteria.

The following data dictionary describes the required (R), important (I), and optional (O) variables that participating institutions will prepare. The first row should include the headers listed under the “Variable” column in the table below, except for variables labeled with an (M) – these variables should be included in the Meta Data tab. Accepted values for rows following the header row should correspond to their column labels. For “Academic Area” (acarea), please follow the instructions provided later in this toolkit.

*When formatting the Excel file, be certain to format all cells as text, not numbers. Formatting as numbers can result in formatting problems, such as when the value begins with a zero.*

### Faculty Retention & Exit Study Population Variables

Group Category	Variable	Description	Value labels or examples	(N)umeric/ (S)tring	(R)eq (I)mp (O)pt
0_Sample	localid	Record ID number from campus administrative personnel data. This is a unique identifier (NOT SSN!) that will allow COACHE to link each record to additional, faculty-level data from your campus at a later date.	var.	N	R
1_Institution	institution	Partner institution, i.e., your institution, as the name would appear in an official document.	e.g., University of California Los Angeles	S	R
1_Institution	nickname (M)	Nickname of partner institution, as it would appear in an email to faculty.	e.g., UCLA	S	R
1_Institution	unitid (M)	IPEDS "Unit I.D." of partner institution	000001-999999	N	R
1_Institution	school	School, College, or Division of partner institution (if applicable). Exclude eponyms (e.g., "Government," not "Kennedy School of Government").	e.g., Arts & Sciences	S	R
1_Institution	dept	Department of partner institution (if applicable). Avoid acronyms like "MCB". Exclude "Department of".	e.g., Molecular and Cellular Biology	S	R
1_institution	contactname (M)	Name of COACHE liaison, i.e., the individual at partner institution whom faculty may contact to verify COACHE's bona fides.	e.g., Dr. Jane Smith	S	R
1_institution	contactemail (M)	Email of individual named in contactname	e.g., jsmith@ucla.edu	S	R
2_Name	lname	Last name / Surname of faculty member.		S	R
2_Name	fname	First name of faculty member (and middle name, if necessary)		S	R
2_Email	email	Current primary email address. Please search exhaustively for a current email for departures. (COACHE is not responsible for locating email addresses. Please work with Department Chairs to locate individuals who have left the institution).		S	R

Group Category	Variable	Description	Value labels or examples	(N)umeric/ (S)tring	(R)eq (I)mp (O)pt
2_SurveyPath	path	Departure, Retention, and Preemptive Retention categories will determine the survey pathway that respondents receive.	1 = Left Partner Institution (“departure,” non-retiree) 2 = Received external offer and decided to stay at partner institution (“retention”) 3 = Received a preemptive retention (“preemptive”)	N	R
3_Demographic	race	Racial/ethnic identification	1 = Asian or Asian American 2 = White (non-Hispanic) 3 = Black or African American 4 = Hispanic or Latino/a 6 = Multiracial 7 = Pacific Islander or Native Hawaiian 8 = Middle Eastern, North African, Southwest Asian 9 = American Indian or Native Alaskan 91 = Other	N	R
3_Demographic	gender	Gender identification	1 = Woman 2 = Man 4 = Genderqueer/Gender non-conforming 91 = Not listed above	N	R
3_Demographic	citizen	Citizenship status	1 = US Citizen 3 = Permanent Resident 5 = A visa holder (F-1, J-1, H1-B, A, L, G, E, and TN) 91 = Other	N	R
3_Professional	rank	Rank ( <i>at time of external offer</i> )	1 = Instructor/Lecturer; 2 = Assistant Professor 3 = Associate Professor 4 = Full Professor 5 = Emeritus 91 = Other	N	R
3_Professional	tenure	Tenure status ( <i>at time of external offer</i> )	1 = Not tenured, not on tenure track 2 = Not tenured, on tenure track 3 = Tenured	N	R
3_Professional	title_primary	Primary title(s) ( <i>at time of external offer</i> )		S	I

Group Category	Variable	Description	Value labels or examples	(N)umeric/ (S)tring	(R)eq (I)mp (O)pt
3_Professional	title_admin	Title for any administrative appointment ( <i>at time of external offer</i> )	e.g., Center Director, Department Chair	S	O
3_Professional	yearhire	Year of hire at partner institution	YYYY	N	R
3_Professional	apptyear	Year in which most recent faculty appointment began	YYYY	N	R
3_Professional	cip	Classification of Instructional Programs code from NCES (see <a href="https://nces.ed.gov/ipeds/cipcode/">https://nces.ed.gov/ipeds/cipcode/</a> ).	000000 – 999999	S	
3_Professional	acarea	COACHE “Academic Area” code. (See below.)	11 - 24	N	R
3_Professional	clinical	Clinical status (at time of external offer)	0 = None 1 = Clinical faculty 2 = Adjunct 3 = In residence 91 = Other	N	R
3_Professional	clinical_loc	Clinical site	e.g., Midtown Clinic - West	S	O
3_Professional	employactiondate	Date of relevant employment action (e.g., separation, retention, termination)	YYYYMMDD	N	R
4_Investment	salary_annual	Salary (annualized) prior to departure/retention		N	R
4_Investment	startup	Startup funds (total)		N	I

Group Category	Variable	Description	Value labels or examples	(N)umeric/ (S)tring	(R)eq (I)mp (O)pt
5_Contribution	teachingload	Number of courses taught in most recent complete academic year		N	O
5_Contribution	grants_number	Number of grants from external sources in past 5 years		N	O
5_Contribution	grants_value	Total value of grants from external sources in past 5 years		N	O
5_Contribution	aa_quintile	Academic Analytics Productivity Quintile (if a client of Academic Analytics)	1 = First Quintile 2 = Second Quintile 3 = Third Quintile 4 = Fourth Quintile 5 = Fifth Quintile	N	O
5_Contribution	aa_fspi	Academic Analytics Faculty Scholarly Productivity Index, expressed as a z-score (if a client of Academic Analytics)	e.g., -0.97	N	O
99_NewInstitution	new_org	Current organization of employment (Departures) or recruiting/offering institution, if known (Retentions).	e.g., University of North Carolina at Chapel Hill	S	R
99_NewInstitution	new_title	Title at new organization, upon arrival		S	O
99_NewInstitution	new_rank	Rank at new organization, upon arrival	1 = Instructor/Lecturer; 2 = Assistant Professor 3 = Associate Professor 4 = Full Professor 5 = Emeritus 91 = Other	N	I

Group Category	Variable	Description	Value labels or examples	(N)umeric/ (S)tring	(R)eq (I)mp (O)pt
99_NewInstitution	new_adminappt	Administrative appointment at new organization, upon arrival	0 = None 1 = President or Chancellor 2 = Chief Academic Officer 3 = Dean or Division Chief 4 = Vice, Associate, Assistant Provost 5 = Associate, Assistant Dean 6 = Department Head or Chair 7 = Center or Program Director 91 = Other 97 = Missing/Don't Know	N	I
99_NewInstitution	new_tenure	Tenure status at new organization, upon arrival	1 = Not tenured, not on tenure track 2 = Not tenured, on tenure track 3 = Tenured	N	I
99_NewInstitution	new_school	School, College, or Division of new organization (Departures) or of offering/recruiting organization (Retentions) (if applicable). Exclude eponyms (e.g., "Government," not "Kennedy School of Government").	e.g., Arts & Sciences	S	I
99_NewInstitution	new_dept	Department of new organization (Departures) or of offering/recruiting organization (Retentions),if applicable. Exclude "Department of".	e.g., Molecular and Cellular Biology	S	I

## UNDERSTANDING THE DEPARTMENT-TO-ACADEMIC AREA CROSSWALK

The COACHE analytical report will include results by “Academic Area.” These academic areas were developed based on a review of structural designations (i.e., schools and colleges, which differ from campus to campus) and Classification of Institutional Programs (CIP) codes, which are too narrowly defined for IRB-approved reporting. The fourteen academic areas are:

- Humanities
- Social Sciences
- Physical Sciences
- Biological Sciences
- Visual and Performing Arts
- Engineering, Computer Science, Mathematics, and Statistics
- Agriculture, Natural Resources, and Environmental Science
- Business
- Education
- Health and Human Ecology
- Medical Schools and Health Professions
- Other Professions, including (among others) Architecture, Journalism, Law, Library
- Interdisciplinary Department/Division – STEM
- Interdisciplinary Department/Division – Non-STEM

For the purposes of creating your master population file, first generate a list of all academic departments on your campus and assign each *department* to one of the fourteen groups listed below. Then, give this “crosswalk” to the person responsible for assembling your master population file, that is, the database of eligible faculty.

<b>11</b> Humanities	<b>18</b> Agriculture/Natural Resources/Environmental Sci.
<b>12</b> Social Sciences	<b>19</b> Business
<b>13</b> Physical Sciences	<b>20</b> Education
<b>14</b> Biological Sciences	<b>21</b> Medical Schools & Health Professions
<b>15</b> Visual & Performing Arts	<b>22</b> Other Professions (e.g. Law, Journalism)
<b>16</b> Engineering/Computer Science/Math/Statistics	<b>23</b> Interdisciplinary Department/Division - STEM
<b>17</b> Health & Human Ecology	<b>24</b> Interdisciplinary Department/Division - Non-STEM

*Example:*

<i>Department</i>	<i>acarea</i>	<i>Academic Area</i>
Physics	13	Physical Sciences
Philosophy	11	Humanities
Psychology	12	Social Sciences
Mathematics	16	Engineering, computer science, mathematics, and statistics
International Relations	24	Interdisciplinary Department/Division – non-STEM