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Ramping Up for the Faculty Retention and Exit Survey Administration

Survey Administration
Timeline

Data Disclosure Options

Strategies for Building
Population File

Survey Eligibility and
Population File Variables

Your COACHE Partner
Portal

coache.gse.harvard.edu



Faculty Retention & Exit Roadmap

What does survey administration look like?



*Please refer to "[Faculty Retention & Exit Survey: Survey Administration Timeline & Resources](#)" for more detail in information.



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Your Data Disclosure Options





Data Disclosure

What data disclosure options do I have?

OPTION #1: Not Receiving Record Level (De-identified) Data

Advantages:

- Confidentiality
- Reduced workload for IR staff

Disadvantages:

- Outsourcing of custom analysis
-

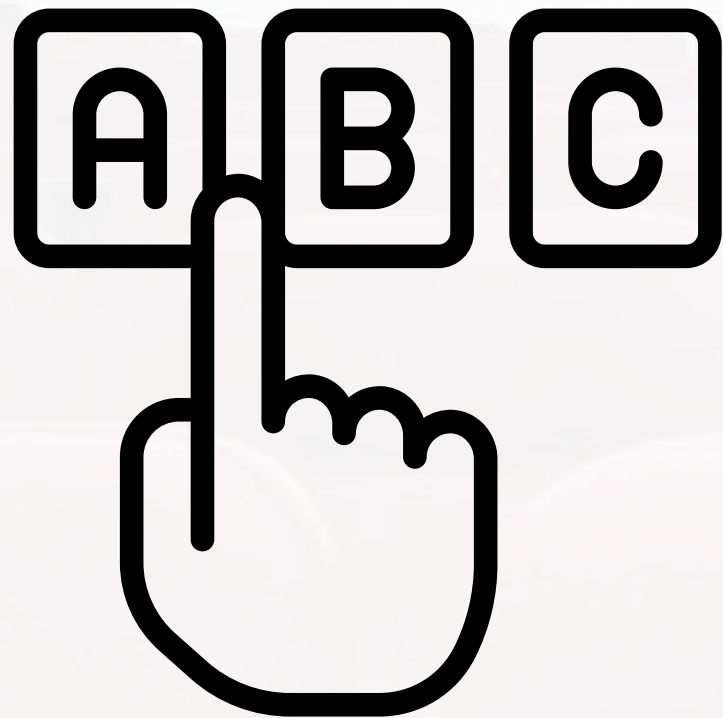
OPTION #2: Receiving Record Level (De-identified) Data

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?

For institutions that decide to receive record level, de-identified data:

The Statement of data confidentiality must be signed by a data administrator. The 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.





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Strategies for Building a Healthy Population File



Population File Preparation

Where to begin?

COMMUNICATE

1

Contact Deans/Chairs in May, before summer administration turnover.

Provide list of eligible requirements

BUILD

2

Put practices in place to forward information from departing faculty

Ensure accurate contact information

3

SHARE

Share population file specification with your Institutional Research team

Summer allows your IR team time to prepare data

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





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Survey Eligibility and Population File Variables



Survey Eligibility Requirements

What information to gather?



- **Appointment types**

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

- **Employment status**

- Departures
- Retentions
- Pre-emptive retentions

- **Separation types**

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

*Please refer to "[Building Your Master Population File](#)" for more detail in information.

Do Not Include!

What should not be a part of the file?



- Faculty in terminal year after being denied tenure
- Senior administrators
 - Deans, Assistant Deans, 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)

*Please refer to [“Building Your Master Population File”](#) for more detail in information.

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.

*Please refer to "[Building Your Master Population File](#)" for more detail in information.



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**

*Please refer to [“Building Your Master Population File”](#) for more detail in information.

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

*Please refer to "[Building Your Master Population File](#)" for more detail in information.



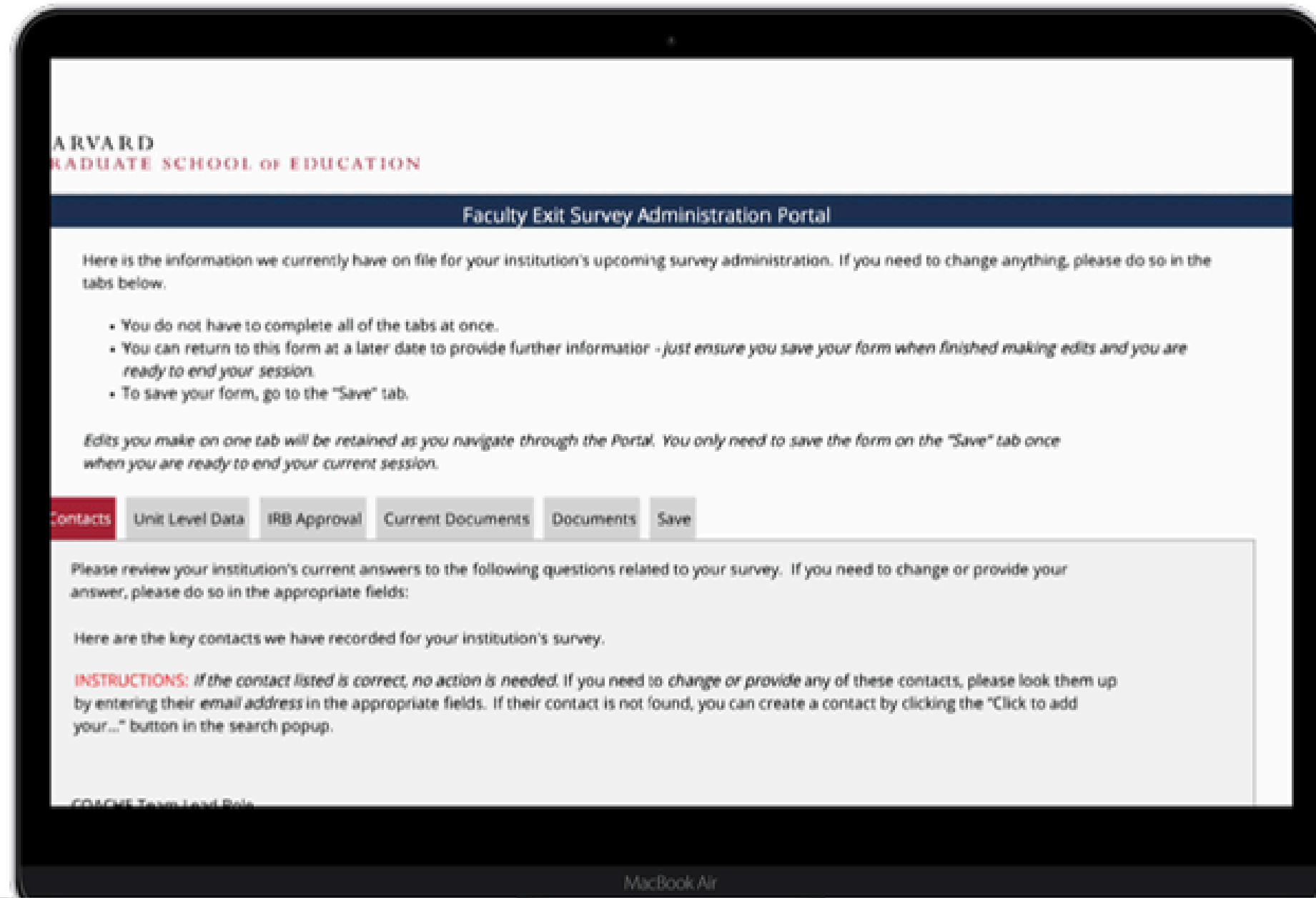
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Your COACHE Partner Portal





COACHE Faculty Retention & Exit Portal



Upload your team contacts



Store your documents and population file(s)



Securely share documents with COACHE team

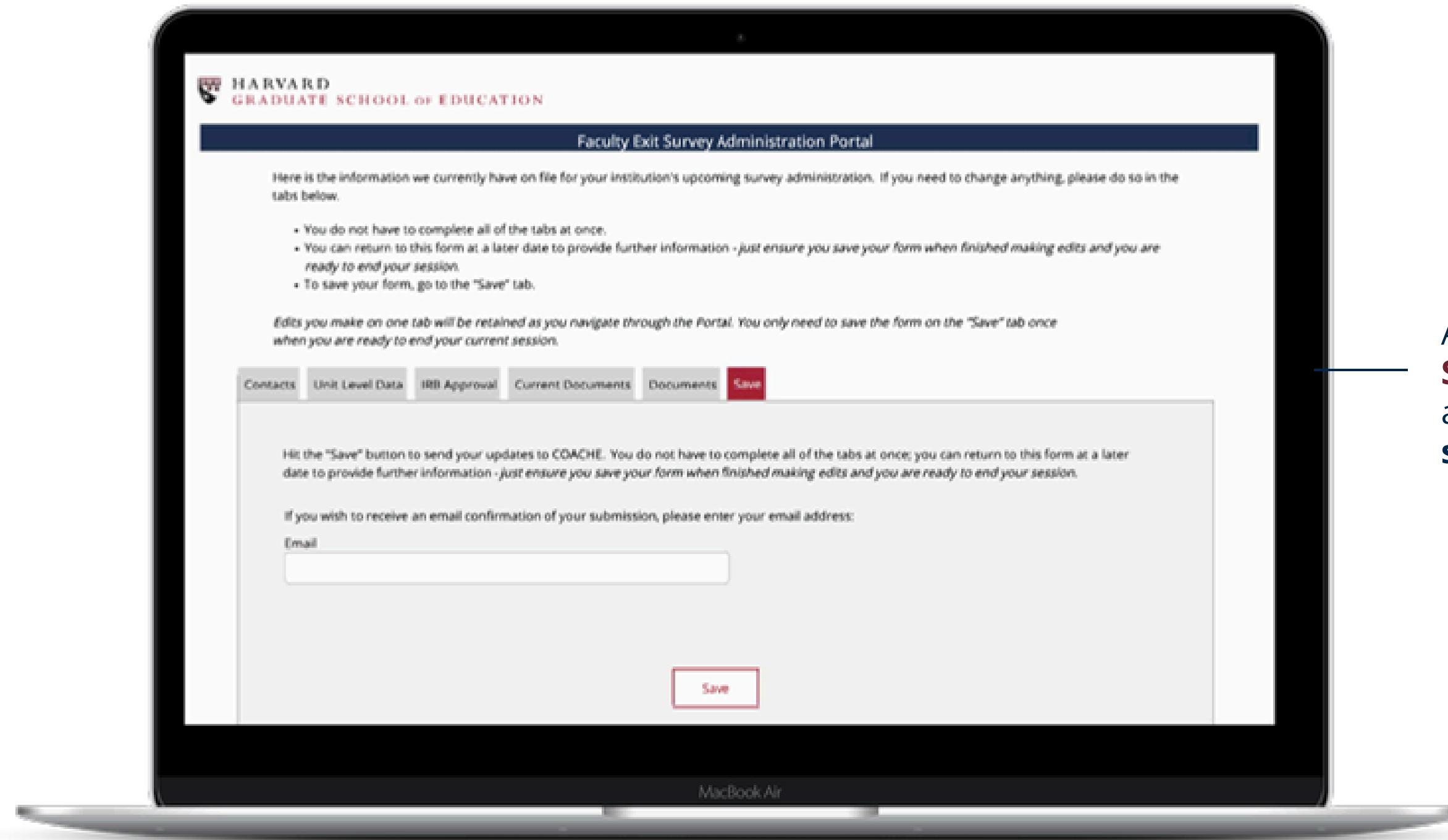


Make institution-specific survey decisions within the partner portal





COACHE Faculty Retention & Exit Portal



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



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For additional information on preparing for your COACHE Faculty Job Satisfaction survey,
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