

BalancedComp

2020 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?

HRIS / Payroll

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

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

What payroll system does your organization use?

PTO - Non-Exempt

How many PTO days (sick plus vacation, not including holidays) are non-exempt employees offered with less than 1 year of service?

How many PTO days (sick plus vacation, not including holidays) are non-exempt employees offered with 1-3 years of service?

How many PTO days (sick plus vacation, not including holidays) are non-exempt employees offered with 3-5 years of service?

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

PTO - Exempt

How many PTO days (sick plus vacation, not including holidays) are exempt employees offered with less than 1 year of service?

How many PTO days (sick plus vacation, not including holidays) are exempt employees offered with 1-3 years of service?

How many PTO days (sick plus vacation, not including holidays) are exempt employees offered with 3-5 years of service?

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

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 2019 merit labor budget?

What was your organization's average NON-EXEMPT salary increase percentage from your 2019 merit labor budget?

What was your organization's average EXEMPT salary increase percentage from your 2019 merit labor budget?

What is your organization's actual/projected average salary increase percentage for your 2020 merit labor budget?

What is your organization's actual/projected average NON-EXEMPT salary increase percentage from your 2020 merit labor budget?

What is your organization's actual/projected average EXEMPT salary increase percentage from your 2020 merit labor budget?

Does your organization have a corporate incentive/bonus plan in place for 2020?

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

- Everyone
- Non-exempt
- Exempt
- Executives
- Exempt & Executives
- Other

Turnover

What was your organization's total turnover percentage for 2019?

What was your organization's NON-EXEMPT turnover percentage for 2019?

What was your organization's EXEMPT turnover percentage for 2019?

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?

Compared to last year, has your organization's employer contribution changed for an individual policy?

- Yes, the employer contribution % increased
- Yes, the employer contribution % decreased
- No change

Compared to last year, has your organization's employer contribution changes for a family health insurance policy?

- Yes, the employer contribution % increased
- Yes, the employer contribution % decreased
- No change

Benefits - 401(K)

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?

Benefits - SERP

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 eligible to participate?

If yes to SERP, what is the projected replacement % for the CEO (SERP benefit/projected final income)?

- <15%
- 15%-30%
- 31%-50%
- <50%
- Other

If yes to SERP, what is the projected replacement % for the other executives (SERP benefit/projected final income)?

- <15%
- 15%-30%
- 31%-50%
- <50%
- Other

If yes to SERP, how many payments are planned at retirement?

- Lump Sum
- 10 years
- 15 years
- 20 years
- Lifetime
- Other

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

- Split Dollar
- Defined Benefit
- Defined Contribution
- Other

Gender Pay Equity

Did your organization conduct analysis for gender pay equity issues in 2019?

- Yes
- No
- No, but we plan to in 2020

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

Minimum Wage

Does your organization have an internal minimum wage that is higher than the state/federal/local minimum wage?

If yes to the prior question, what is your organization's internal minimum wage hourly rate?

Remote Work

Does your organization allow remote work?

Does your organization have any full-time remote positions?

If yes to the prior question, how many employees work full-time remote?

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 2019)

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	\$10.30	\$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	\$10,00.00	\$0.00	etc.