

# 2018 CBAI Survey

## **This is a sample**

Feel free to use this PDF to gather data you might need before taking the survey online.

# Participation Agreement

## Ownership and Title

Nothing contained in this Agreement grants the respondent, either expressly or implied, any right, title, interest, or license in or to the intellectual property of BalancedComp.

## Confidentiality

BalancedComp agrees it shall not use the respondent information for any purpose outside the scope of services. Individual Respondent data will not be singled out and that all data will be anonymized before publication. Access to respondent information shall be restricted to those employees who need to know such information to perform services agreed to by the respondent.

All written and oral information and material disclosed or provided by BalancedComp to the respondent under this Agreement is Confidential Information, regardless of whether it was provided before or after the date of this Agreement or how it was provided to the Respondent. Confidential Information will not include information that:

1. is commonly known in the Financial or Human Resources industry
2. is now or subsequently becomes generally available to the public through no wrongful act of the respondent.
3. that was rightfully in the possession of the Respondent prior to disclosure by BalancedComp to the Respondent
4. is independently created by the respondent without direct or indirect use of the Confidential Information
5. is obtained from a third party who has the right to transfer or disclose the information

## Remedies

Both parties agree and acknowledge that the Confidential Information is of a proprietary and confidential nature and that any disclosure of the Confidential Information to a third party is a breach of this Agreement and cannot be reasonably or adequately compensated for in monetary damages and would cause irreparable injury to the non-disclosing party. Accordingly, each party agrees the non-disclosing party is entitled to, in addition to all other rights and remedies available to it at law or in equity, and injunction restraining the disclosing party and any agents of the disclosing party, from directly or indirectly committing or engaging in any restricted by this Agreement in relation to the Confidential Information.

# Nice to meet you!

First Name

Last Name

Email

Phone

## Where do you work?

Institution Name

Assets (in millions)

County

## Where do you work?- Part 2

Which best classifies the market your bank competes in? (Urban is classified as a dominant influence of a population of 50,000 or more)

- Chicago Metro Area
- Urban Other
- Rural

How many physical branch locations does your organization have? (please include all full & partial service branches)

- 1
- 61+

# **PTO - Non-Exempt (Sick days plus vacation, not including company holidays)**

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)

- 0
- 56+

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)

- 0
- 56+

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)

- 0
- 56+

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

- 0
- 56+

# **PTO - Exempt (Sick days plus vacation, not including company holidays)**

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)

- 0
- 56+

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)

- 0
- 56+

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)

- 0
- 56+

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

- 0
- 56+

# Health Benefits

What percentage of the total premium does the organization contribute toward a family health insurance policy for NON-EXEMPT employees? (Round to the nearest %)

- 0%
- 100%

What percentage of the total premium does the organization contribute toward an individual health insurance policy for NON-EXEMPT employees? (Round to the nearest %)

- 0%
- 100%

What percentage of the total premium does the organization contribute toward a family health insurance policy for EXEMPT employees? (Round to the nearest %)

- 0%
- 100%

What percentage of the total premium does the organization contribute toward an individual health insurance policy for EXEMPT employees? (Round to nearest %)

- 0%
- 100%

# Retirement

Does your organization offer a 401(k)?

- Yes
- No

If yes to the last question, what is the maximum % amount the organization will match?

- 1%
- 21%+

Does your organization offer a Roth IRA?

- Yes
- No

Does your organization offer a SERP to the CEO?

- Yes
- No
- No, but we intend to look into this in 2018

# Payroll

How many total (full & part time) employees does the bank employ?

How many employees are EXEMPT?

How many employees are NON-EXEMPT?

# Budgeting

Do you prorate merit increases for employees employed less than 1 year?

- Yes
- No

When do your merit increases go into effect for NON-EXEMPT employees?

- Custom date in January
- Custom date later in the year
- On employee's hire date
- On employee's date in position

When do your merit increases go into effect for EXEMPT employees?

- Custom date in January
- Custom date later in the year
- On employee's hire date
- On employee's date in position

# Chairman of the Board

How many board meetings does the bank schedule per year?

- 0
- 25+

How much did the Chairman of the board receive as an annual retainer fee last year?

How much did the Chairman of the board receive per board meeting last year?

How much did the Chairman of the board receive per committee meeting last year?

What was the total cash compensation (base plus any retainers and fees, plus incentives) received by the Chairman of the board last year?

# Outside Directors

How many Outside Directors currently sit on the board?

- 0
- 16+

What was the average annual retainer fee paid to an Outside Director last year?

What was the average per board meeting fee paid to an Outside Director last year?

What was the average per committee meeting fee paid to an Outside Director last year?

What was the average total cash compensation received by Outside Directors last year?

# Inside Directors

How many Inside Directors currently sit on the board?

- 0
- 16+

What was the average annual retainer fee paid to an Inside Director last year?

What was the average per board meeting fee paid to an Inside Director last year?

What was the average per committee meeting fee paid to an Inside Director last year?

What was the average total cash compensation received by Inside Directors last year?

# Lets get that data

## 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 2017)

### 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.