

CAMPUS BUSINESS OFFICER

# BENCHMARKING TOOL



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## Quick Start Guide

This guide describes how to get started in the tool.  
View the following pages for illustrated descriptions on how to enter data,  
view question comparisons and run dynamic reports.

**Website:** <https://benchmarking.sacubo.org>

**Questions?** [resource@sacubo.org](mailto:resource@sacubo.org)

**Don't have an account?** Email [resource@sacubo.org](mailto:resource@sacubo.org) today!

# Accessing the Tool

- New Users

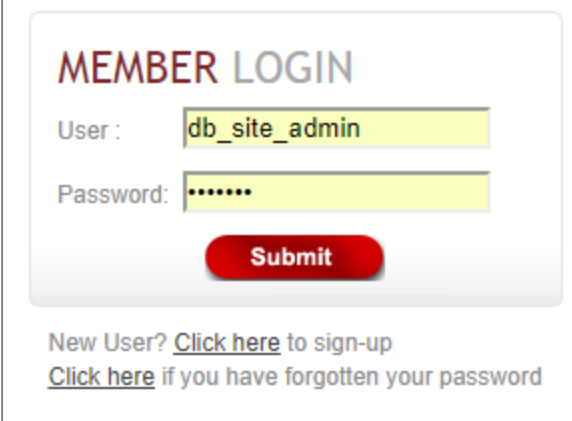
- Follow the link on the login page to sign-up for an account.
- Once you complete the sign-up form, you will be brought immediately into the platform.

- Tool Access

- Benchmarking website: <https://benchmarking.sacubo.org>
- You can log in and out of the platform as often as you wish, entering your user & password information for login.
- This is a single solution where you will enter data and access results.

- Browser Support - All browsers for Windows 7 or above are fully supported as follows:

- Use the recommended browser settings for security and cookie settings. Cookies must be enabled to support the logging in process.
- Internet Explorer 10 or later - support for IE is going to be phased out when Windows 7 is no longer supported by Microsoft.
- Edge – new browser that comes with Windows 10.
- Chrome/Firefox/Safari – these browsers auto-update so the latest version should be used.



**MEMBER LOGIN**

User :

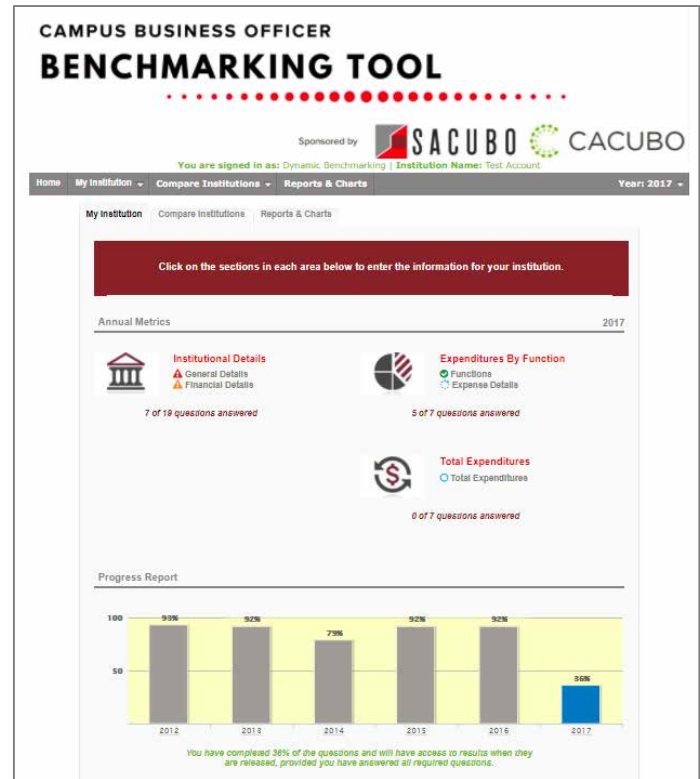
Password:

**Submit**

New User? [Click here](#) to sign-up  
[Click here](#) if you have forgotten your password

# Your Home Page

- **My Institution:** Answer the questions in the Tool.
- When results become available, they are accessed via:
  - **Compare Institutions** – View question by question comparisons
  - **Reports & Charts** – Download dynamic and personalized reports.



## My Institution:

- Questions are carefully organized into categories & subcategories.
  - Select any subcategory to view and answer questions.
- Questions can be answered in any order.
- Status icons next to each subcategory indicate your progress.
  - ✓ All questions have been answered, no further action needed.
  - No questions in this group have been answered.
  - ⊙ Some questions have been answered but more answers are needed.
  - ⚠ There are unanswered “required” questions.
  - ⚠ There is a numeric question with an answer outside of a defined range.
- Your overall progress can be tracked through the progress graph & messaging at the bottom of the page.

## Benchmarking Support

- Once you have logged in, click on the **Support** link in the top right corner of your platform to access support documentation and contact information.

# Managing Account Users

- Adding additional users
  - Account administrators can add new users as well as manage existing users in your account through the **Company Setup** link at the top of the home page. This link will not display if you do not have this permission.
- Add new user contact information and set user permissions:
  - Administrator: Company Setup access, as well as read-write permission.
  - Read-Write User: Can enter data & access results.
  - Read-Only User: Can view results but cannot add or edit data.
  - Write-Only: Can add or edit data but cannot access results.
- New users will immediately receive an email with their user name and log-in instructions. Occasionally these emails are caught by spam filters, so be sure to check spam/junk folders.

★Welcome Message★ | My Account | **Company Setup** | Support | Logout

## Contributing Data for Multiple Accounts

- If you are reporting data for more than one company, the benchmarking support team can help you set up additional accounts. Email support at [resource@sacubo.org](mailto:resource@sacubo.org).
- To switch from one account to another, click on the **Current Account** dropdown menu at the top of the home page to select the account.
- Always check the account you are in before entering or updating your data.

Current Account: Test Account ▼

★Welcome Message★ | My Account | Company Setup | Support | Logout

# Entering Your Data

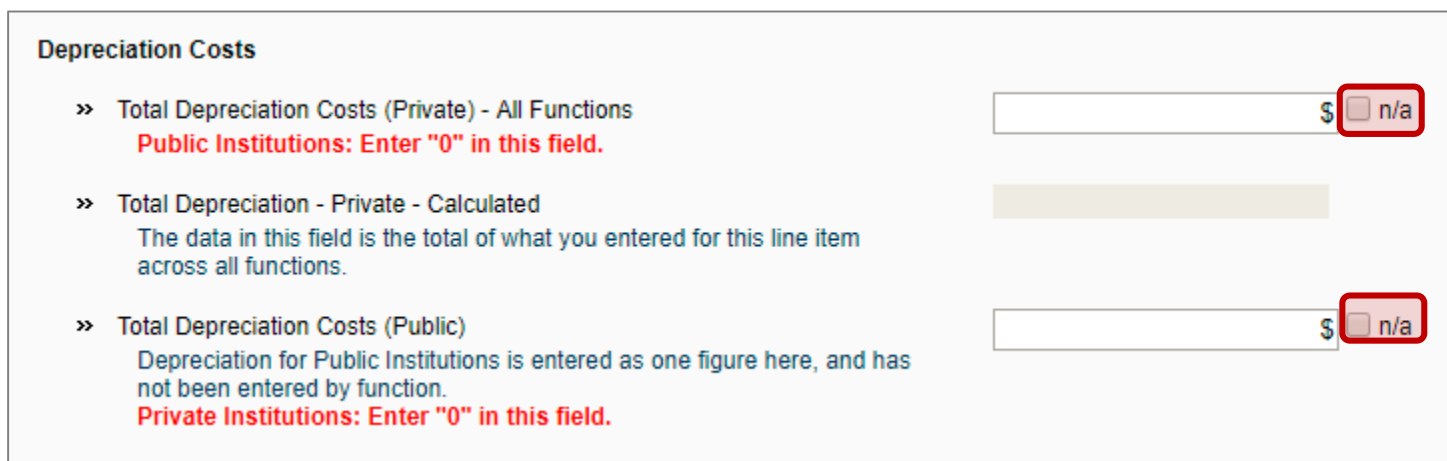
- As you enter data, the entry box turns green, indicating that new data has been provided and must be saved by clicking the **Save** or **Save & Next** button at the bottom of every page.
- To abandon or discard newly entered data, click **Cancel**.
- Any required questions are noted with a large, red asterisk **\***.



>> Institution Designation \*

>> Reporting System \*

- Some questions have the option of checking **n/a**, indicating that the question does not apply to you. Selecting **n/a** counts towards your overall survey progress.



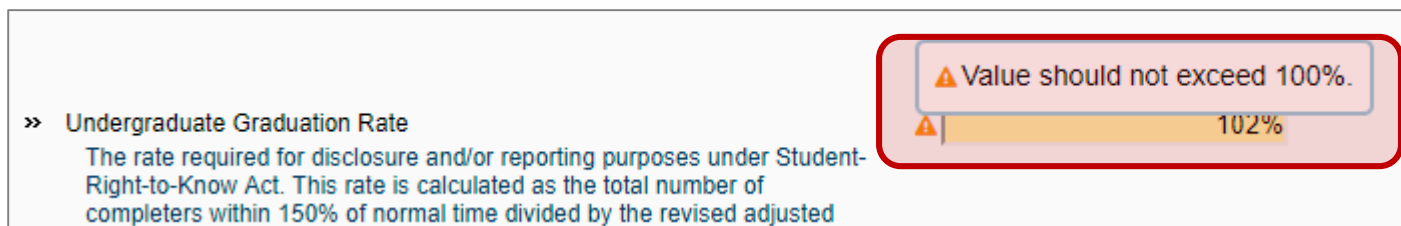
**Depreciation Costs**

>> Total Depreciation Costs (Private) - All Functions \*  n/a  
**Public Institutions: Enter "0" in this field.**

>> Total Depreciation - Private - Calculated  
The data in this field is the total of what you entered for this line item across all functions.

>> Total Depreciation Costs (Public) \*  n/a  
Depreciation for Public Institutions is entered as one figure here, and has not been entered by function.  
**Private Institutions: Enter "0" in this field.**

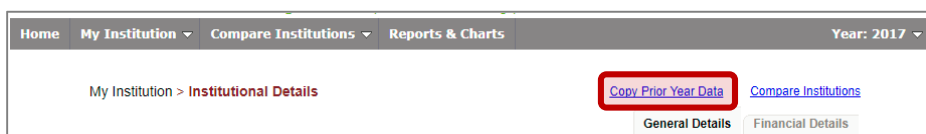
- Some numeric questions are set with expected answer ranges. If you enter a value outside of the expected range, you will see a warning sign appear. You will be able to save this data, but it will be flagged as being out of the expected range.



>> Undergraduate Graduation Rate  
The rate required for disclosure and/or reporting purposes under Student-Right-to-Know Act. This rate is calculated as the total number of completers within 150% of normal time divided by the revised adjusted

▲ Value should not exceed 100%.  
▲ 102%

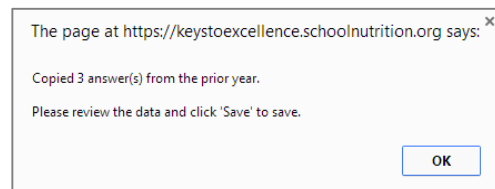
- In subsequent years of data entry, select **Copy Prior Year** to pull forward your previous year's data. If you have already started data entry, using this option will not overwrite your current saved answers.
- A pop-up box will tell you how many answers were copied from prior year. Click **OK**, return to the page, modify any data as necessary. Then click **Save** at the bottom of the page to save your answers before moving forward.



Home My Institution Compare Institutions Reports & Charts Year: 2017

My Institution > Institutional Details [Copy Prior Year Data](#) [Compare Institutions](#)

General Details Financial Details



The page at <https://keystoexcellence.schoolnutrition.org> says: ×

Copied 3 answer(s) from the prior year.

Please review the data and click 'Save' to save.

OK

# Expenditures by Function Data Collection

The Expenditures by Function section is set up to make it easy to answer the same series of questions for multiple functions.

- On the **Functions** tab:

- Select the functions for which you will be reporting, then click **Save & Next** to answer questions for each function you selected.

>> Indicate the functions for which your institution is reporting

[The Glossary of Function Definitions](#) is available to assist you in choosing which functions you should be reporting on for your institution.

**Private Institutions:** Please enter O&M of Plant and Depreciation expenses as you report them on your institution's financial statement. However, for comparative purposes, we are also asking you to report Employee FTEs, Compensation & Benefits, and Other costs for O&M separately. These O&M costs will be reported twice, however, they will not be double counted in any expense totals.

- Instruction
- Research
- Public Service
- Academic Support
- Student Services
- Institutional Support
- Hospitals
- Operations & Maintenance of Plant
- Scholarships & Fellowships
- Auxiliary Enterprises
- Independent Operations

Save Cancel **Save & Next >**

- On the **Expense Details** tab:

- The dropdown box displays the function(s) you selected on the previous page.
- Answer the questions for the function displayed.
- Click **Save & Next** at the bottom of the page to save your answers and move to the next function in the list.
- Continue in this manner until you have answered all the questions for every function in the dropdown box.
- Review your answers for any function by selecting it in the dropdown list at any time.
- When you have answered all the questions, click **Save & Next** to continue with the survey.
- If at any time you wish to clear the data for a function, simply return to the list of functions, uncheck that function, and click **Save** at the bottom of the page, clearing all data previously entered for that function.

Choose which item you would like to edit... **Instruction**

Select each option from this list to fill in the answers for that option.

---

**Total Employees**

- Full Time Equivalent (FTE) Employees   
Enter the number of FTE Employees in this function. Employees who are less than full time should be counted as a percentage of full-time. For example, an employee who works 30 hours/week, 12 months/year should be counted as .75 FTE. Student Employees: Inclusion or exclusion of student employees is institution-dependent. Institutions which rely on student employees as part of their regular workforce should include them in their FTE employee counts. Institutions which employ students primarily in work-study type positions should exclude them from their FTE employee counts.

**Total Function Costs**

- Total Function Costs   
Public Institution: Compensation, Benefits and Other Costs  
Private Institution: Compensation, Benefits, Other, Operations & Maintenance of Plant, and Depreciation.

**Detailed Function Costs**

- Compensation & Benefits
- Other Costs   
When reporting on the **function of Operations & Maintenance of Plant**, do not include depreciation.

The following items apply to Private Institutions. Public Institutions, enter "0" in each of the fields below. "0" will be excluded in comparison charts and reports.

- Operations & Maintenance of Plant  n/a  
PRIVATE INSTITUTIONS: When reporting on the **function of Operations & Maintenance of Plant**, enter "0" in this field.
- Depreciation by Function  n/a  
PRIVATE INSTITUTIONS: When reporting on the **function of Operations & Maintenance of Plant**, enter "0" in this field.

**Total Function Costs - Verification**  
This field is automatically calculated after you click the save button below. The difference shown here should be zero, confirming that your Total Function Costs by line item equal what you entered above.

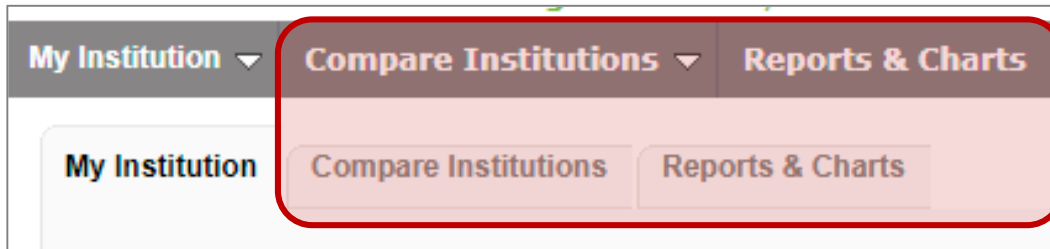
Total of Above: \$9,000,000  
Expected Total: \$10,000,000  
Difference: \$1,000,000

Save Cancel **Save & Next >**

# Accessing Results When Available

When released, results will be available for all users who answered all required questions and completed a minimum 50% of all questions.

- Results are available in two formats via **Compare Institutions** and **Reports & Charts**.
  - **Compare Institutions** : See how you compare to other participants for every question in the Tool.
  - **Reports & Charts** : Download personalized, dynamic reports.



- To ensure data anonymity, all results are aggregated and a minimum of 5 data points is required, even when filters are applied.
  - Numeric results are presented in quartiles, values that divide a list of numbers into quarters:
    - 25th Percentile/first quartile: 25% of the data fall below this percentile.
    - 50th Percentile/median: The median represents the middle number where 50% of answers are lower and 50% are higher .
    - 75th Percentile/third quartile: 75% of the data fall below this percentile.
  - Multiple Choice results are reported with the percentage of answers associated with each response option for that question.
  - Unless a chart is presenting multiple pieces of data (such as in a pie chart), your responses will be presented in **burgundy**.

# Using Filters

Filters allow you to drill down and compare your answers to a subset of respondents. All results continue to be aggregated with a minimum of 5 data points, even when filters are applied.

- Click **Change** to activate the filters.
  - Numeric filters: Click **Add** to activate sliders. Use slide bar to set a numeric range by moving the blue squares or enter a number in boxes.
  - Multiple choice filters: Choose from the drop down menus.
  - Select one or more filters.
  - Click **Apply** to activate your filter selection.

The screenshot shows a filter panel with the following items:

Filter	Value	Change...	(Filter Help)
Institution Category	Any		
Public/Private	Any		
Reporting System	Any		
Outsourced Services	Any		
Intercollegiate Athletics Reported	Any		
College/School of Medicine	Any		
Total FTE Students - Undergraduate	Add...		
Total FTE Students - Graduate	Add...		
Net Tuition & Fees	Add...		
Peer Cluster	Any	New...	

- If your filter selection returns too few accounts, you will see this message:

*Your filter settings are not currently active because not enough accounts match the selection. Results are currently displayed without filter settings.*

- If your filters do not return enough accounts, change your filter settings by:
  - Widening the range of a numeric filter.
  - Turning off a numeric filter by clicking the **X**.
  - Returning a multiple choice filter to **Any**.
  - Click **Clear** to start over and select different filter options.

The screenshot shows the filter panel with the following items:

Filter	Value	Apply	Clear	Cancel	(Filter Help)
Institution Category	Any				
Public/Private	Any				
Reporting System	Any				
Outsourced Services	Any				
Intercollegiate Athletics Reported	Any				
College/School of Medicine	Any				
Total FTE Students - Undergraduate	0 - 60K		X		
Total FTE Students - Graduate	0 - 10K		X		

- Filters will carry forward onto other compare pages as well as the reports page, until they are cleared.
- Once you have found a filter setting that works for you, save it as a filter favorite to easily use again.

The screenshot shows the filter panel with the following items:

Filter	Value	Change...	Save As Favorite...
Institution Category	Research		
Public/Private	Private		

## Peer Cluster Filters

Peer Cluster filters allow you to select a group of five (5) or more participating accounts for your comparison data set.

- Click **Change** to activate the filters.
- Click **New** to create your peer cluster.
- Name your Peer Cluster, then click **OK**.
- Select your comparison accounts from the list of companies participating in the Tool, then click **Save**.
- Be sure to click **Apply** to activate your filter selection.

**Recommendation:** Deactivate all other filters before using peer clusters.

The screenshot shows the filter panel with the following items:

Filter	Value	Apply	Clear	Cancel	(Filter Help)
Institution Category	Any				
Public/Private	Any				
Reporting System	Any				
Outsourced Services	Any				
Intercollegiate Athletics Reported	Any				
College/School of Medicine	Any				
Total FTE Students - Undergraduate	Add...				
Total FTE Students - Graduate	Add...				
Net Tuition & Fees	Add...				
Peer Cluster	Any			New...	

Below the filter panel, a dialog box titled "The following institutions may be added to your Peer Cluster..." is shown. It contains a table of institutions:

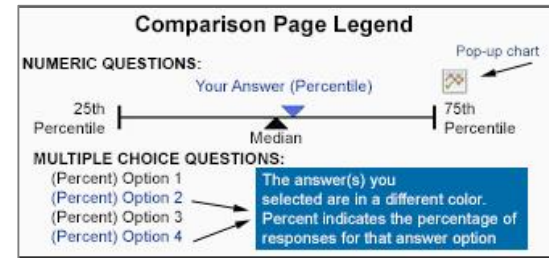
Name	State
Add... Abilene Christian University	Texas
Add... Adventist University	Florida
Add... Alabama Agricultural & Mechanical University	Alabama
Add... Alabama Southern Community College	Alabama
Add... Alcorn State University	Mississippi
Add... Alice Lloyd College	Kentucky

At the bottom of the dialog box, there are "Save" and "Cancel" buttons. The "Save" button is highlighted in red.



# Question by Question Comparisons

- From **Compare Institutions**, click on any question group or subgroup to begin viewing comparisons.
- Multiple choice questions: The percentage of responses for each answer option is displayed. Your answers are indicated in **burgundy**.
- Numeric questions: Results are charted on a line with the 25<sup>th</sup>, Median and 75<sup>th</sup> percentiles. Your answer and your percentile are above the line and represented by the blue arrow.
- Click on the icon to the right of each comparison result to view the data in a chart, which can then be saved as either PDF or PPT.



## Personalized, Dynamic Reports

- From **Reports & Charts**, click on a report name to download your personalized report.
  - PowerPoint** reports display data in charts and graphs, including year-over-year and multi-year trend charts.
  - Word** reports display data in tables with summary details.
- Use filters to get the most out of your results.
- Filters applied to question by question comparisons will carry forward into reports until they are cleared.

**Generate Reports...**

- Executive Summary**  
The Executive Summary provides an overview of Revenue & Asset, Expense, Employee, and Effectiveness Benchmarks.
- General Institutional Details**  
The General Institutional Details report provides a variety of charts using the data collected in Institutional Details.
- Total Expenditures - All Functions**  
The Total Expenditures report provides a charts for each Total Expenditures by line item.

