



# HelioCampus Benchmarking Consortium Methodology

## What is the Consortium?

The HelioCampus Benchmarking Consortium gives members the insights they need to make data informed decisions, promoting sustainable processes for institutional financial wellbeing & success. Benchmarking data provides visibility into workforce costs, the largest expense at an institution, enabling options for both cost management and revenue generation, informing areas for investment. Through a comprehensive view of labor spend within the institution and across consortium members, institutions also have the data, insights and justification they need to support key financial processes like annual budgeting, resource planning & strategic planning.

## How do we prepare your data for benchmarking?

Once we get a data file from the institution, we are able to consistently map the labor spend data into a Standard Activity Model (SAM) enabling you to compare your spending with other members, as well as within your own institution, by using a common set of analysis factors and characteristics. Reviewing job data by title, organizational unit and responsibilities allows HelioCampus to provide a granular analysis of how employees are actually spending their time.

### STEPS



#### Extract & Organize Data

The HelioCampus development team works with the institution to bring in employee payroll and HR data. Once this data is in the platform, it is then organized into useful subgroups, generally based on job title. Using subgroups makes it easy to group like functions together to facilitate effective sampling.



#### Data Mapping (SAM & SOM)

In order to benchmark effectively, both internally and against other institutions, all data then needs to be mapped to the same set of activities. The HelioCampus Standard Activity Model (SAM) provides the ability to do this. By taking individual job descriptions and breaking them down to a granular level, we're able to provide visibility into a key question: what is that employee actually doing on a daily basis? This data is then paired with an organizational model to determine where these people actually sit within the institution. While the SAM allows us to see what functions are being carried out, the Standard Organizational Model (SOM) allows us to see where those investments are happening. The goal of the SOM is to see if an institution is centralized, decentralized, relies heavily on external labor or a shared services model, and if there are efficiencies or investments to be made in how work is being dispersed across the institution.



#### Schools & Colleges within the Institution & Academic vs. Non-Academic Designations

Finally, in order to benchmark against other institutions with similar schools and colleges, we include this as a field by which we can review the data. We also distinguish between administrative and academic labor investment, and designate which units, divisions and departments should be classified as such.

## What are the benefits of this process?

By mapping your labor spend data in this manner, an institution has the ability to:

- Gain visibility into previously hard to access data;
- Understand costs to balance ongoing resources, supporting a financially sustainable future;
- Demonstrate you are managing finances in alignment with the institutional mission and providing evidence of good financial stewardship for accreditation;
- Utilize data and structured tools to support key financial processes including annual budgeting, workforce planning, resource planning & strategic planning.



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If you would like more information on your HelioCampus Benchmarking Consortium Membership or any other HelioCampus solutions, **contact your CSM**.

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