Agenda

1. Introduction and Roll Call (5 minutes)
2. Project Timeline (5 minutes)
3. Project Status Update (5 minutes)
4. Out-of-Scope Themes (5 minutes)
5. Job Framework (15 minutes)
6. BVA Analysis (10 minutes)
7. Engagement activities – System and Madison (5 minutes)
8. Monthly Advisory Council Report-Out (10 minutes)
# Title and Total Compensation Study

## I. Design and Study Strategy
- Review Data
- Develop project plan
- Stakeholder interviews and focus groups
- Compensation philosophy guiding principles
- Preliminary communication and change management strategy

## II. Assess Positions and Develop New Job Title Structure
- Job titling framework
- Map positions to the titling framework
- Create/update job descriptions
- Stakeholder briefings

## III. Create Compensation Structure
- Analysis of market data
- Pay range development
- Salary administration guidelines
- Stakeholder briefings

## IV. Review Benefits / Work-life and Leave Structures
- Analysis of work/life and leave benefits
- Gap analysis and recommend solutions
- Stakeholder briefings

## V. Implement New Structures
- Presentation to stakeholders
- Finalize program based on stakeholder feedback
- Finalize communication and change strategy
- Deliver Targeted communications
- Training for ongoing program administration

## Project Timeline

|----------|----------|----------|----------|----------|
Project Status Update

**Completed**

- Preliminary determination of job families and sub-families
  - Identified differences between UW-Madison and UW System
- Preliminary development of job level descriptors
- UW System institutions named institution project teams
- UW-Madison initiated and trained Job Family Functional Teams

**Upcoming**

**November**

- JDXpert Job Description Software Tool
  - Customization
- UW System institutions will complete job family and sub-family review with institution content subject matter experts
- UW-Madison will hold listening sessions for job family and sub-family review

**December**

- Revisions and Convergence (UW System and UW-Madison) of job families and sub-families
- Continued refinement of job level descriptors
Out-of-Scope Themes

The June 20 Interview Findings Report from Mercer excluded interview themes outside the scope of the TTC Study. The handout attached with this presentation includes those themes.

University of Wisconsin – TTC Study

The following interview themes are primarily outside the scope of the TTC Study and were not captured in Mercer’s Stakeholder Interview Findings Report, dated June 20:

Pay Administration
- Can we pay 6-month employees over 12 months?
- Should employees be on the same pay schedule (e.g., bi-monthly, every 2 weeks, monthly) so transition to a new job is not a burden?
- Funding for salaries and salary adjustments is very limited and problematic. The University cannot use grant money or donations for raises.

Benefits/Perquisites
- Shift in cost sharing means less take-home pay and hits lower-paid employees the hardest.
- A 401k benefits would be more attractive to employees, or cash in lieu of benefits.
- Vacation should be on a fiscal year versus calendar year.
- Expense reimbursements should be different for urban locations.

Performance and career progression
- The current system is based on what the supervisor wants the employees to do and not the job description.
- Some pay you may benefit from incentives/awards and would make the System a more attractive employer.
- Employee development and training is critical, but we don’t put resources into it.

Instructional staff
- Instructional staff should be considered faculty. The “non-faculty” classification hampers our ability to recruit.
- Instructional staff are “counted” as faculty and perform similar work.
- Specialized instructors teaching practical courses are paid very differently relative to their field.
- Academic Research Staff are not allowed to teach without a waiver.
- Faculty should be in scope for the salary component of the project.

Miscellaneous
- Can we create a job where we hire smart people at a level and then move them around? Utility players? Formal 1.5 year rotation before selection in position?
- Diversity is a problem in hiring and retention and we seem to have given up.
- Defining HR policy should be HR professionals, not other senior administrators.
- We poach from one another which is counterproductive.
- Negative UW Madison media exposure hinders recruiting at all institutions.
- There are recruiting challenges in small markets due to lack of opportunities for training spouses, access to cultural/other enrichment, etc.
- The HRIS system is very limited in effectiveness. It is a payroll system only and not integrated system wide so it cannot “talk to one another.”
- Access to computers should be provided to the 3rd shift.
- We need the ability to terminate more quickly.
Job Framework – Iterative Process

Model socialized with Institutional Stakeholders

Mercer & Planning Team Develop Preliminary Model

Preliminary Model socialized with HR Leaders at UW System, Working Team at UW-Madison and the Advisory Council

Preliminary Model socialized with project teams (includes governance)

UW System and UW-Madison converge concepts
## Job Framework – Process

### Job Framework

<table>
<thead>
<tr>
<th>Job Families, Subfamilies (Now to 1/18)</th>
<th>Career/Job Level</th>
<th>Job Description Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>• UW-Madison: 20 Job Family Teams kicked off the week of September 25. Will finish work on December 19</td>
<td>• Planning team refined career/job levels and leveling descriptors provided by Mercer</td>
<td>• Joint Project Team has been formed to develop customized JDXpert tool (job description software)</td>
</tr>
<tr>
<td>• UW System: Initiated content subject review of 22 job families including sub-families early September. Institutions will finish work by November 10.</td>
<td>• UW System: Shared with HR Directors for first reading on October 5 with second reading on October 12.</td>
<td>• Estimated timeframe of March, 2018 for managers to work with employees to update job descriptions</td>
</tr>
<tr>
<td>• UW-Madison: Will share with working team (which includes job family functional leads and governance reps on Oct. 17)</td>
<td>• Planning team is currently reviewing how existing titles compare to the proposed career/job leveling system in order to refine leveling descriptors.</td>
<td></td>
</tr>
</tbody>
</table>
Job Framework – Structure ILLUSTRATIVE

**JOB FAMILY**
- Academic Services & Student Experience
- Administration
- Advancement
- Animal Care
- Arts
- Athletics/Recreational Sports
- Communications and Marketing
- Community Outreach & Public Education
- Compliance, Legal & Protection
- Executive Leadership
- Facilities and Capital Planning
- Health Services
- Human Resources
- Information Technology
- Instruction
- Libraries and Museums
- Research Administration
- Research, Laboratories & Diagnostics
- Sales and Hospitality

**SUB-FAMILY**
- Accounting / Financial Reporting
- Budget, Financial Planning & Analysis
- Financial Operations
- Procurement

**CAREER LEVEL**
- Level
- Level
- Level
- Level
- Level
- Level
- Level
- Level
- Level
## Career/Job Level EXAMPLE – Organizational Contributor

<table>
<thead>
<tr>
<th>Sample Level Descriptor</th>
<th>Organizational Impact</th>
<th>Complexity of Work</th>
<th>Independence and Supervision</th>
<th>Leadership and Talent Management</th>
<th>Knowledge and Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Level 4</strong></td>
<td>4</td>
<td></td>
<td></td>
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<tr>
<td>OC4</td>
<td>4</td>
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<tr>
<td></td>
<td>Executes job responsibilities guided by expected outcomes and standards. Responsible for accomplishing defined work on projects/programs.</td>
<td>Problems faced are varied, and involve some evaluation and interpretation. Resolution requires interpretation of policies or analysis. Decisions typically impact own team, department, and potentially related areas.</td>
<td>Guided by work standards, and receives directional guidance on work activities. Works under general supervision.</td>
<td>May guide the work of volunteers and/or student workers. May be responsible for guiding work of others on work activities.</td>
<td>Typically requires knowledge of principles, practices and theories in a field or specialty. Incumbents would generally possess a Bachelor’s degree and at least 2 years of related work experience or equivalent combination of education and work experience.</td>
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<td></td>
<td>Work frequently involves collaboration with others within and outside the work unit. Sets objectives for own work schedule to meet the goals of work unit, project and assignments. May coordinate and/or provide input into projects, programs, or systems.</td>
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<tr>
<td><strong>Level 3</strong></td>
<td>3</td>
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<td></td>
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<tr>
<td>OC3</td>
<td>3</td>
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<tr>
<td></td>
<td>Executes job responsibilities guided by expected outcomes and standards.</td>
<td>Problems faced may be varied, but generally within expected parameters. Problems can generally be resolved through use of policies, procedures and standards. Decisions have direct impact on the work flow, timing and quality of outcomes of a unit.</td>
<td>Works under general supervision, guided by work standards.</td>
<td>May guide work of volunteers and/or student workers.</td>
<td>Typically requires knowledge of principles and practices in a field or specialty. Skills are developed through application of standards/processes within a narrow scope of work. Incumbents would generally possess at least 2 years of experience and post secondary education or equivalent combination of education and work experience.</td>
</tr>
<tr>
<td></td>
<td>Sets objectives for own work schedule to meet the goals of work unit, project and assignments. May participate as a member of teams or projects within own department or others at the institution.</td>
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</tbody>
</table>
Benefit Value Analysis (BVA)

**Business Challenge**

“I need data to help me prevent turnover by gauging the competitiveness of our benefits plans in comparison to our peer groups while making sure we are not overpaying.”

**The Solution**

Get detailed descriptions of plan provisions, understand comparisons of employee profiles, and see the estimated amount of pretax salary an employee needs to replace benefits.

- **Plan Value Comparisons**
  Shows how benefit plans’ market replacement value compares to peers.

- **Employee Profile Comparisons**
  Values, rankings and indices to assess value and competitiveness of benefit plan through a sample census / workforce.

- **Summary of Plan Features**
  Information of major employee benefit plan types including retirement/savings, health/group and time loss benefits.

**BVA Advantage**

The Benefits Valuation Analysis (BVA) is a custom, comparative, benchmarking report that analyzes how benefit plans compare to a chosen peer group in degrees of increasing specificity – by all plans together, by plan groupings, and by individual plans.
Benefit Value Analysis (BVA)

DESCRIPTION OF BENEFITS COLLECTION

The following elements will be collected for the various employee groups.

**Defined Benefit Plans**
- Final average
- Service credit
- Cash balance
- Retirement equity
- Career average

**Stock Purchase Plan**

**Health Plans**
- Medical, Retiree medical
- Dental, Retiree dental
- Employer-paid life insurance
- Flexible benefits plan
- Flexible spending accounts

**Defined Contribution Plans**
- 401(k)/403(b)
- Profit sharing

**Time Loss Plans**
- Sick pay
- Short-term disability
- Long-term disability
- Paid-time off
- Vacation
- Holidays
- Personal days
- Sabbatical leave

**Work Flexibility**
- Flextime
- Free/subsidized parking

**Money purchase**
- 457 deferred compensation
- ESOP
- 401(a)

**Telecommuting**
- Satellite workplace
- Work at home
- Business casual
- Job sharing

**Wellness/Fitness**
- Subsidized eating facility
- Wellness Program
- Onsite Fitness Facility
- Paid/Subsidized Offsite Fitness

**Financial Assistance**
- Discount Purchasing
- Legal Counseling
- Financial Planning Assistance
- Gambling Addiction Counseling

**Family Assistance**
- Funeral Leave
- College Scholarships
- Employee Assistance Plan
- Child/Elder Care
- Lactation Rooms
- Adoption Benefits
- Onsite Child Care
- Educational Assistance
- Severance
- Vision
- Long-term Care


**Engagement Activities**

**UW System**

- Presented to Joint Governance on 9/22/17.
- Positive feedback received from Chancellors on communication efforts.
- Each institution is working with content subject matter experts to refine 22 job families including sub-families.
- Each institution continues to refine communication strategies with its stakeholders.
- Institutions holding various meetings with its stakeholder groups.
- Continue weekly Title and Total Compensation teleconferences with the Project Steering Committee
- Continuous refinements to communication plan in consultation with UW-Madison and Mercer
- Website updated continually

**UW-Madison**

- Twenty Job Family Functional Teams are working to refine job families and sub-families.
- Weekly Collaboration and Outreach Team meetings to strategize campus engagement
- Five Campus Forums in September/October (2 multi-lingual, 4 English, 1 online)
  - As of 10/2/17, 773 attended forums with 95% satisfaction with the content.
- Bi-monthly updates at HR Representatives meetings
- Ongoing Study communications include (next round will introduce listening sessions week of Nov. 27): Dean & Directors/Shared Governance/HR Reps emails, *Inside UW-Madison* article, *Working at UW-Madison* article, multi-lingual flyer distribution to employees by managers, multi-lingual all employee email)
- Continuous refinements to communication plan in consultation with UW System and Mercer
- Website updates including job family exploration tool
Advisory Council Report Out

During future monthly meetings of the Advisory Council, there will be time for Advisory Council members time to provide updates on TTC-related engagement activities. The following should guide the updates:

- Ways in which you engaged constituent groups (e.g. group email, focus group, face-to-face, stakeholder meetings, web-postings, blogs, etc.)
- Interactions you had with your institution HR directors? Project teams? Workgroups?
- Specific concerns employees raised with you about the study
- Other issues or concerns would you like to bring forward
Thank you!