

# **Title & Total Compensation Project**

Title Appeals Training



**PARTICIPANT GUIDE**

January-February 2022

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This icon lets you know to reference your **Participant Guide** at key points during the training.

## Training Overview

### Description:

TTC Title Appeals Training is intended to review the core concepts and methodology underlying the implementation of the Title and Total Compensation Project so appeal panel members can knowledgeably assess title appeal requests.

Topics include:

- Job Titles & Best Fit
- The Role of the Panel Member & The Standard of Review
- Getting Started & Additional Considerations

### Target Audience:

Training is designed for employees who will be involved in:

- The review of title appeal requests at their institution

### Learning Objectives:

At the end of the session today, you will be able to understand:

- The function of a standard job description
- The job mapping process and methodology used to match employees to standard job descriptions in the job library including,
  - Title sets/levels,
  - Best fit concept,
  - Primary job concept,
  - Compliance with supervision requirements, and
  - FLSA legal obligation
- Your role as a panel member
- The standard of review and supporting documentation
- The process and considerations of reviewing a title appeal

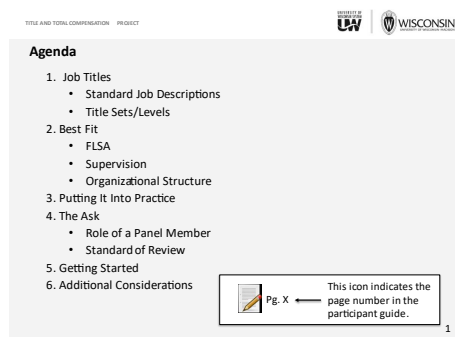
## Materials/Supplies:

- Participant Guide
- PowerPoint Slides

## Prior to Training

- This training is designed to help title appeal panel members navigate the review process and resource materials. Additionally, it may provide some guidance to troubleshoot issues that arise in the review and discussion if title appeals using a systemwide standard of review.

## Welcome (Slide 1)




TITLE AND TOTAL COMPENSATION PROJECT

UNIVERSITY OF WISCONSIN

**Agenda**

1. Job Titles
  - Standard Job Descriptions
  - Title Sets/Levels
2. Best Fit
  - FLSA
  - Supervision
  - Organizational Structure
3. Putting It Into Practice
4. The Ask
  - Role of a Panel Member
  - Standard of Review
5. Getting Started
6. Additional Considerations

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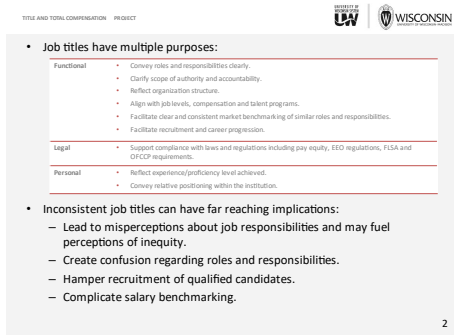
Thank you for joining us today. We have a full agenda for this 1.5-hour training. Although we have a lot to cover during this time, please ask questions so you understand the task at hand. The goal of the training is for you to obtain the information needed to be a confident and informed panel member.

We will cover:

- Job Titles & Standard Job Descriptions
- Best Fit Concept
- Your Role as a Panel Member & Standard of Review
- Getting Started & Additional Considerations

NOTE: UW-Madison will conduct a separate training for their governance participants that is specific to their institutional title appeals process.

## Job Titles (Slides 2 – 12)



Job titles help employees understand their organizational fit and the jobs they should apply for in the future.

Job titles also help employers organize and define the expectations they have for each employee.



Job titles have multiple purposes:

<b>Functional</b>	<ul style="list-style-type: none"> <li>Convey roles and responsibilities clearly.</li> <li>Clarify scope of authority and accountability.</li> <li>Reflect organization structure.</li> <li>Align with job levels, compensation and talent programs.</li> <li>Facilitate clear and consistent market benchmarking of similar roles and responsibilities.</li> <li>Facilitate recruitment and career progression.</li> </ul>
<b>Legal</b>	<ul style="list-style-type: none"> <li>Support compliance with laws and regulations including pay equity, EEO regulations, FLSA and OFCCP requirements.</li> </ul>
<b>Personal</b>	<ul style="list-style-type: none"> <li>Reflect experience/proficiency level achieved.</li> <li>Convey relative positioning within the institution.</li> </ul>


Inconsistent job titles can have far reaching implications:

- Lead to misperceptions about job responsibilities and may fuel perceptions of inequity.
- Create confusion regarding roles and responsibilities.
- Hamper recruitment of qualified candidates.
- Complicate salary benchmarking.

TITLE AND TOTAL COMPENSATION PROJECT

**Standard Job Description (SJD)**

- **What are we doing?**
  - The idea is that the standard job descriptions will serve as a basis for understanding the core and common work being performed. And we can then use this to align the work to the market and creating market informed pay ranges.
- **How are we doing this?**
  - We created standard job descriptions that capture the core, common work done across our institutions.
- **Why did we take this approach?**
  - Mercer, our consulting partner, identified a need to develop standard job descriptions which is a leading practice. Many higher education institutions took this approach and were successful. Some examples are the University of Michigan and the University of Virginia.  Pg. 6

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So now, let's talk about the job description transformation we just went through with the Title and Total Compensation Project (TTC).

First, why are we doing this?

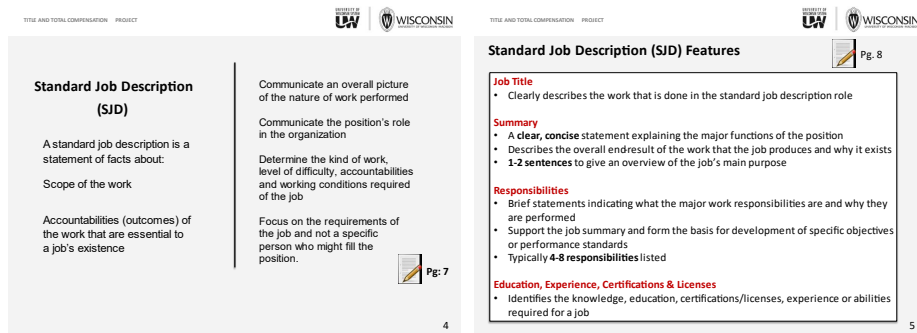
- To ensure we are competitive with other employers who are competing for the same talent as UW, we need to understand how our compensation compares. One of the goals of the TTC project was to develop market informed pay ranges. Establishing the Standard Job Descriptions (SJDs) is a fundamental basis for this process.

How are we doing this?

- We created standard job descriptions that capture the core, common work done across our institutions.

Why did we take this approach?

- Mercer, our partner for the TTC, identified a need to develop standard job descriptions which is a leading practice. Many higher education institutions took this approach and were successful. Some examples are the University of Michigan and the University of Virginia.



A standard job description is a statement of facts about:

- Scope of the work
- Accountabilities of the work that are essential to a job's existence

Standard Job Descriptions (SJDs)

- Communicate an overall picture of the nature of work performed
- Communicate the position's role in the organization
- Determine the kind of work, level of difficulty, accountabilities and working conditions required of the job
- Focus on the requirements of the job and not a specific person who might fill the position.

All SJDs contain the following features:

- A job title
- A summary
- Responsibilities
- And Education, Experience, Certifications and Licenses

When you read through the SJDs, you will notice that while they contain many of the same components of position descriptions, but the approach to creating those components is **very** different.

The summary for example is short, concise and represented by a few sentences.

The responsibilities focus on the high level, core tasks and are generally represented by 4-8 responsibilities per title.

You may be thinking,

- How is that short of a job description possibly capture everything that employees do, inform employees what they are supposed to do, or help employees and managers to know if the right work is being done?
- The answer is that the SJDs are not supposed to serve all of these purposes. They should represent the common and core work required for the job.

## Before & After Example of the Cheesemaker

### BEFORE

**Summary:** The candidate will be required to have the knowledge, skills and motivation to operate all cheese/dairy processing equipment at the UW Dairy Plant for the Center for Dairy Research. He /She will be assisting faculty and staff with lab demonstrations and research projects and will generally be regarded as an expert operator for all cheese manufacturing systems. This position requires the applicant to hold a Wisconsin Cheesemakers License.

### Responsibilities:

#### A. Advanced Cheesemaking

1. **Will direct** the manufacturing of natural/processed/cold pack cheeses in the dairy plant setting. Must be able to carry out instructions in manufacturing as directed by the immediate staff person responsible for the project. Must have the knowledge and ability to make necessary corrections during the cheese making process.
2. **Develop** and recommend new cheese products for industry information/research and consumer end use.
3. Must prepare bulk cheese cultures.
4. **Packages** cheese by approved methods for aging for research purposes.

#### B. Perform lead work per project.

1. Function as lead worker over lower level dairy plant workers.
2. Monitor quality control issues.
3. **Direct and train student workers, graduate students and LTE's - as pertains to equipment operation, sanitations, and operating procedures in the dairy plant.**
4. **Supervises dairy plant workers in the preparation of ingredients necessary to conduct research.**
5. Assist faculty and staff with demonstrations of processing equipment during classes.

### AFTER

#### Summary:

Manufactures and provides oversight and training for the cheesemaking process to ensure the safe production of high-quality cheese for research and retail.

#### Responsibilities:

- Manufactures cheese following documented cheesemaking procedures and follows sanitation guidelines.
- Monitors cheesemaking quality control processes and reports any issues that may occur.
- Participates in demonstration of the cheese making processes to interested parties.
- Performs, trains and manages the operation of equipment, sanitation and operational procedures



**Title Sets & Levels**

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**Title Sets & Levels**

Differences in levels are based on differences in **work performed**. Levels are distinct and are intended to represent different sets of responsibilities.

**Job summary and responsibilities** in a Standard Job Description describe those differences.

- Some SJDs have differences of 1-2 words between the levels, and the employee must be consistently performing the work of a specific level to use that title.
- For example, IT Project Manager II vs IT Project Manager III, has a difference of language that specified **multi-unit projects vs enterprise projects**.

- Levels do not necessarily correspond to salary grades.
- Levels are not used to distinguish differences in personal characteristics of an employee, such as experience, competencies, or education.

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Each Job Family has Sub-Families. Title are categorized under each Job Family and Sub-Family. Most titles exist as a standalone title. A small percentage of the titles are part of a title set—a title and level 1, 2, 3 etc.

### Job Families

- Academic Services and Student Experience
- Administration
- Advancement
- Animal Care Services
- Arts
- Athletics
- Clinical Faculty
- Communications and Marketing
- Compliance, Legal, and Protection
- Dining, Events, Hospitality Services, and Sales
- Equity, Diversity, and Inclusion
- Executive Leadership
- Facilities and Capital Planning
- Faculty
- Finances
- Health and Wellness Services
- Human Resources
- Information Technology
- Libraries, Archives, and Museums
- Outreach and Community Engagement
- Public Broadcasting
- Research
- Sponsored Programs, Grants, and Contracts
- Teaching and Learning

Levels are distinct and are intended to represent different sets of responsibilities.

\*Levels are not used to distinguish differences in personal characteristics of an employee, such as experience, competencies, or education. \*

In addition, some SJDs have differences of 1-2 words between the levels, and the employee must be consistently performing the work of a specific level to use that title. For example, IT Project Manager II vs IT Project Manager III, has a difference of language that specified **multi-unit projects vs enterprise projects**.

## LEVELS EXAMPLE 1

Academic Advisor I (AA1)	Academic Advisor II (AA2)
<b>Job Summary:</b>	<b>Job Summary:</b>
Engages students in decision making processes and promotes appropriate and responsible choices on academic matters, such as course selection and degree requirements. Maintains appropriate confidentiality, updates student advising records and contributes to the development of academic advising related programming. This individual will work to ensure students receive accurate, timely and holistic advising services in support of promoting student success, retention and program completion.	Engages students in decision making processes and promotes appropriate and responsible choices on academic matters, such as course selection and degree requirements. Maintains appropriate confidentiality, updates student advising records and contributes to the development of academic advising related programming. This individual will work to ensure students receive accurate, timely and holistic advising services in support of promoting student success, retention and program completion.
<b>Responsibilities:</b>	<b>Responsibilities:</b>
1. Receives, processes, and responds to academic inquiries according to established policies and procedures.	1. Receives, processes, and responds to academic inquiries according to established policies and procedures.
2. Serves as a main point of contact for students; providing information about educational options, academic requirements identifying and assessing interests, skills, and values to match appropriate field of study/career options and refers to appropriate institutional resources.	2. Serves as main point of contact for students; providing information about educational options, academic requirements identifying and assessing interests, skills, and values to match appropriate field of study/career options and refers to appropriate institutional resources.
3. Implements academic advising programs, such as, workshops, panel discussions and guest speakers.	3. Implements academic advising programs, such as, workshops, panel discussions and guest speakers.
4. Maintains confidentiality and accurate student records as well as processes and responds to academic inquiries according to established institutional and FERPA policies.	4. Maintains confidentiality and accurate student records as well as processes and responds to academic inquiries according to established institutional and FERPA policies.
	5. Participates in campus-wide advising community providing input to leadership regarding the development of advising, recruitment or co/curricular programs offered by the school/college.
	6. Leads the day-to-day operational activities of an academic advising unit.

How would you describe the difference between the two jobs?

*Highlight through discussion:*

- Academic Advisor 2 performs two extra duties
- If employee does all AA1 plus another responsibility of AA2, likely still AA1. But if employee does all AA1 plus both of the extra duties, then likely AA2.
- Now, if employee performs additional duties on top of what's described in AA2, does not mean that they should be an AA3 (which doesn't exist)



**LEVELS EXAMPLE 2**

<b>Animal Care Technician I (ACT1)</b>	<b>Animal Care Technician II (ACT2)</b>
<b>Job Summary:</b>	<b>Job Summary:</b>
Feeds animals and maintains animal quarters, records, and supplies to ensure compliance with animal care regulations and in support of research and instruction.	Collects samples and administers medication and treatments, in addition to feeding and maintenance responsibilities, to ensure compliance with animal care regulations and support research and instruction.
<b>Responsibilities:</b>	<b>Responsibilities:</b>
1. Inventories, cleans and maintains organization of animal holding spaces and supplies.	1. Cleans and maintains organization of animal holding spaces.
2. Assists with preparing food and formulas and feeds animals according to established schedules and specifications.	2. Prepares food and formulas and feeds animals according to established schedules and specifications.
3. Inspects and reports problems on equipment to ensure optimal and safe operation.	3. Inspects, maintains, and initiates complex repairs to equipment to ensure optimal and safe operation.
4. Maintains organization of and updates records related to research procedures.	4. Maintains organization of and updates records related to work unit procedures.
5. Observes animal behavior, performs basic animal care and reports concerns to the appropriate entities to contribute to the health and well-being of animals in support of research and instruction.	5. Observes animal behavior, performs animal care and reports concerns to the appropriate entities to contribute to the health and well-being of animals in support of research and instruction.
	6. Tracks inventory levels of animal supplies and places replenishment orders.
	7. Collects samples from animals, administers medications, injections and treatments according to established protocols and procedures to be used for diagnostic and research.
	8. Leads the day-to-day operational activities of an animal care work unit and facilitates staff trainings as needed.

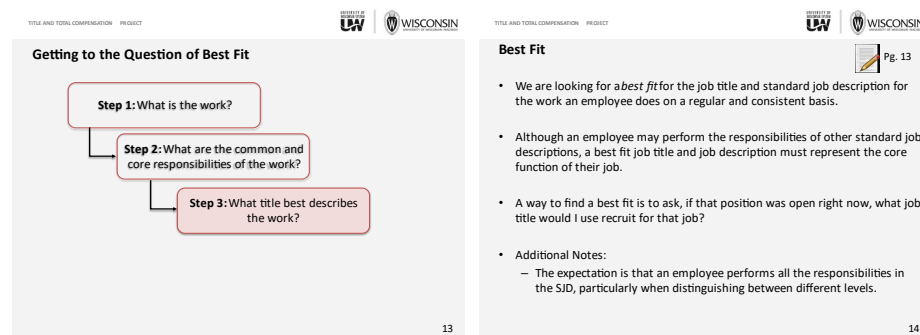
How would you describe the difference between the two jobs?

*Highlight through discussion:*

- Some responsibilities overlap, but ACT2 performs at a more complex level (e.g., not just inspect equipment, but maintain and possibly getting equipment repaired)
- ACT2 performs additional duties like collect samples and administering medication that requires more skills
- ACT2 takes lead on operational activities

These are some EXAMPLES of levels, and do not capture all the ways that levels differ. You will need to look carefully at job summary and responsibilities like we did just now when you are discussing appropriate level placement.

## Best Fit (Slides 13 – 19)



**Getting to the Question of Best Fit**

- Step 1: What is the work?
- Step 2: What are the common and core responsibilities of the work?
- Step 3: What title best describes the work?

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**Best Fit**

- We are looking for a *best fit* for the job title and standard job description for the work an employee does on a regular and consistent basis.
- Although an employee may perform the responsibilities of other standard job descriptions, a best fit job title and job description must represent the core function of their job.
- A way to find a best fit is to ask, if that position was open right now, what job title would I use recruit for that job?
- Additional Notes:
  - The expectation is that an employee performs all the responsibilities in the SID, particularly when distinguishing between different levels.

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In order to create the Standard Job Descriptions, we first had to ask, ‘What is the work that employees are currently doing.

Then we needed to know, of all the work that employees are doing, what is the common and core work that is done in in similar jobs?

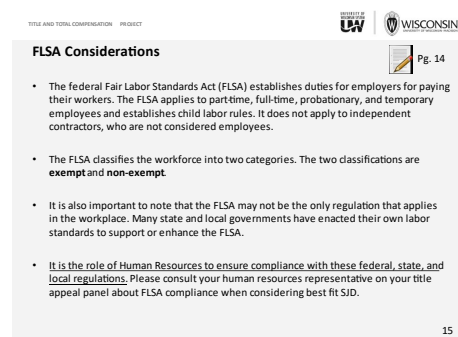
Once we knew that, we were able to ask, “Of all the titles that are currently in the job library, which one best describes an employee’s primary role in the organization?”

**We are looking for a best fit for the job title and standard job description for the work an employee does on a regular and consistent basis.**

- An employee may and probably does more than what is in a standard job description, but they cannot do less.
- Although an employee may perform the responsibilities of other standard job descriptions, a best fit job title and job description must represent the core function of their job.
- A way to find a best fit is to ask, if that position was open right now, what job title would I use recruit for that job?

Additional Notes:

- The expectation is that an employee performs all the responsibilities in the SJD, particularly when distinguishing between different levels.



TITLE AND TOTAL COMPENSATION PRESENT

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**FLSA Considerations** Pg. 14

- The federal Fair Labor Standards Act (FLSA) establishes duties for employers for paying their workers. The FLSA applies to part-time, full-time, probationary, and temporary employees and establishes child labor rules. It does not apply to independent contractors, who are not considered employees.
- The FLSA classifies the workforce into two categories. The two classifications are **exempt** and **non-exempt**.
- It is also important to note that the FLSA may not be the only regulation that applies in the workplace. Many state and local governments have enacted their own labor standards to support or enhance the FLSA.
- It is the role of Human Resources to ensure compliance with these federal, state, and local regulations. Please consult your human resources representative on your title appeal panel about FLSA compliance when considering best fit SJD.



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TITLE AND TOTAL COMPENSATION PROJECT  



**Supervision**  Pg. 15

**Lead Worker:** Plans, schedules, assigns and reviews work of individuals or for a defined project, program or function

**Functional Manager:** Plans, organizes, allocates resources, assesses performance, and leads the operational activities of a defined project, program, or function (ex: budgetary spending, space utilization, administrative resources and schedules); may also have supervisory responsibilities, but it is not required.

**People Manager:** Any individual whose principal work is different from that of the individual's direct or indirect subordinates and who has supervisory authority, in the interest of the employer, to hire, transfer, suspend, promote, manage conduct and performance, discharge, assign, reward or discipline at least 2.0 FTE or equivalent employees, adjust their grievances, and/or to authoritatively recommend such action, if the individual's exercise of such authority is not of a merely routine or clerical nature, but requires the use of independent judgment. Supervisory responsibilities typically also review the work of their immediate subordinates and may approve hours worked.

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TITLE AND TOTAL COMPENSATION PROJECT  

**Defining 2.0 FTE equivalency**

**\*2.0 FTE or Equivalent:** "At least 2.0 FTE or equivalent" means 2 full-time employees or the equivalent.



**\*Indirect subordinates:** the employees who report to your direct reports and their subordinates.

For example:  
 1 full-time and 2 half-time employees are equivalent to 2 full-time employees.  
 4 half-time employees are also equivalent to 2 full-time employees.

**May count towards 2.0FTE - Student Hourly Employees and Temporary Employees (TE)** Full-time generally means someone who works 40 or more hours per week. If student hourly employees and temporary employees are involved when determining if the 2 full-time employee equivalency is met, there must be supervision of 2 or more employees for a combined total of 80 hours of work by such employees.

**Non-Employees** When determining if the 2 full-time equivalency is met, only those who are employees may be considered. Supervision of volunteers, independent contractors, employees of independent contractors, or any other non-employees (e.g., Non-service Appointments such as Trainees, Postdoctoral Fellow, etc.) in relation to the employer are not considered for purposes of this assessment.

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TITLE AND TOTAL COMPENSATION PROJECT  

**Supervision Language in Standard Job Descriptions**

In most instances, if the SJD has the word 'Supervisor' in the title, it indicates that incumbents perform duties outlined in the 'People Manager' definition.

In most instances, if the SJD has the word 'Manager' in the title, it indicates incumbents perform duties outlined in the 'People Manager' definition and/or the 'Functional Manager'.

In most instances, if the SJD has the word 'Director' in the title, it indicates that incumbents perform duties outlined in the 'People Manager' definition.

**May And/Or Language**  
 Responsibilities in SJDs that include the word 'may' means that the responsibility can be met but does not have to be met by an employee to select this SJD as a best fit.

- Language stating 'and/or' regarding people/function management must be met by an employee selecting this SJD. If an employee does not perform one or the other, a new SJD must be chosen.
- Responsibilities containing references to budget, people management, and strategy must be met by an employee selecting this SJD. If an employee does not perform these responsibilities, a new SJD must be chosen.

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**Reference the [TTC Job Mapping Resource - Defining Levels of Supervision](#) resource document for additional information about supervision language**

**Any combination of direct reports, indirect subordinates, and if your institution has specified—students and grad assistants—may be used to meet the supervision requirement, AND requires that work is consistently reported at 80 hours a week, not just occasionally.**

- In most instances, if the SJD has the word 'Supervisor' in the title, it indicates that incumbents perform duties outlined in the 'People Manager' definition.

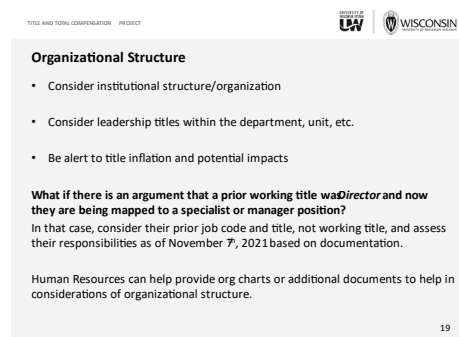
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## May And/Or Language

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TITLE AND TOTAL COMPENSATION PROJECT

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**Organizational Structure**

- Consider institutional structure/organization
- Consider leadership titles within the department, unit, etc.
- Be alert to title inflation and potential impacts

**What if there is an argument that a prior working title was Director and now they are being mapped to a specialist or manager position?**  
In that case, consider their prior job code and title, not working title, and assess their responsibilities as of November 7, 2021 based on documentation.

Human Resources can help provide org charts or additional documents to help in considerations of organizational structure.

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Consider,

- institutional structure/organization, and
- leadership titles within the department, unit, etc

Be alert to title inflation and potential impacts.



Human Resources can help provide org charts or additional documents to help in considerations of organizational structure.

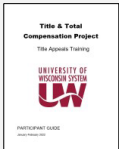
TITLE AND TOTAL COMPENSATION PROJECT

**Mapping Exercise** Pg. 17

Identify a Title/Standard Job Description for an employee based on their Position Description using the jobs available in the job library.

You will have:

- The employee's current Position Description (see Participant Packet)
- The Title and Standard Job Description Library (access [online](#) "Job Library")



→ The **Participant Guide** contains an activity and materials for review and reference

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TITLE AND TOTAL COMPENSATION PROJECT

**What if...** Pg. 20

1. An employee's current job description is not accurate?
2. An employee's job is split between multiple roles?
3. No Title/Standard Job Description exists for a current job?

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TITLE AND TOTAL COMPENSATION PROJECT

**Mapping Exercise Reflection**

**Discussion Questions:**

- What questions do you have as you complete this activity?
- What part of the review process was easy to accomplish?
- What was difficult?
- What questions do you have?

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## Job Title: Sr Admin Program Specialist

### Job Summary:

This position is responsible for payroll of considerable difficulty for the large, complex and unique division employee payroll and independently oversees, supervises, and manages the payroll functions for all employee types. This includes the Dean's Office and approximately 46 departments, centers and support units. The division payroll involves approximately 6000 employees being paid on a complex variety of funds crossing various divisions at UW Madison.

This position serves as the supervisor for the payroll and benefits team which consists of nine Payroll and Benefits Specialist throughout the unit. This position is responsible for distributing payroll work throughout the payroll and benefits team and recommending and implementing staffing changes as needed. This position will be responsible for the hiring, training, development and performance reviews of the payroll and benefits team. This position is responsible for representing the unit payroll team on divisional and campus committees.

This role requires comprehensive knowledge of the PeopleSoft Human Resource System (HRS); the position serves as the primary HRS resource and expert for the operation and maintenance

of the system to ensure that policies and procedures relating to appointments and payroll are being followed at all levels; proper appointment and payrolling of classified and unclassified staff; acting as a resource to payroll and benefits staff as well as HR business partners; auditing complex and detailed funding information; coordinating funding and appointment changes between the HRS system and other campus and department IT systems; serving as a resource person and liaison for departments for a variety of payroll issues; and coordinating and conducting workshops and one-on-one training and orientation programs.

## **Principal Duties**

### **Responsible for establishing and providing excellent & consistent Payroll & Benefit service to all division employees (40%)**

1. Assure compliance with federal and state laws, and University of Wisconsin, UW-Madison and divisional policies and procedures
2. Set deadlines for monthly payroll planning calendar distributed to division departments.
3. Coordinate payroll splits and appointment changes between departments and other colleges.
4. Determine the need for special payrolls, check corrections, salary cost transfers (SCT's) or other corrective documents. Initiate and process accordingly.
5. Coordinate Inter-session, Summer Session and Summer Service payrolls. Audit for compliance with campus "9ths" rule.
6. Review and audit regular and end-of-month payrolls. Determine appropriateness of pay types and transaction codes to assure that leave time is generated if appropriate and retirement is taken if appropriate.

### **Supervision, Training and Development of division Payroll and Benefits Staff (20%)**

1. Recruit, interview, hire, train, evaluate and, when appropriate, discipline division Payroll and Benefits staff.
2. Ensure work team members have the necessary knowledge and training to successfully perform the functions of their job.
3. Monitor activities, review workload, modify schedules, and approve leave reports and requests.
4. Review work performance of work team members, ensuring that performance is consistent with department expectations.
5. Provide annual evaluations to work team members, including recommendations for salary adjustments as applicable.
6. Set goals and performance standards; coach and counsel employees; provide annual and probationary performance reviews and complete probationary reports.
7. Update existing position descriptions and create new position descriptions as required.

8. Review, recommend, and approve requests for training and professional development.
9. Recommend recruitment and reclassification of positions as appropriate.
10. Lead, train and support payroll and benefits staff in transitioning to new Payroll delivery service structures, processes and procedures.

### **Process Improvement (20%)**

1. Collaborate with colleagues in HR and IT to develop and/or create reports for Management regarding payroll related information
2. Responsible for developing and implementing overarching payroll policies, strategies, and practices with the aim of furthering the division's missions
3. In partnership with the Talent Management SME's, HR Managers, HR Business Partners and Payroll staff, develop work flows for the various payroll related transactions for the new service model and team structure
4. Determine long-range priorities, considering impact on division Payroll staff as well as Human Resource Office. Advise management on emerging trends.

### **Communication Management (15%)**

1. In collaboration with division HR leadership, lead the communications regarding payroll and benefits
2. Creates and manages content for various payroll communications including: HR Forums, division website, intranet
1. modifications, enhancements and updates, and other channels to ensure employees have knowledge of training events and general payroll and benefit information.
2. Actively participate in university committees and projects that will impact division payroll and represent the interests of the division.
3. Acts as liaison for payroll issues and resolve problems in consultation with departments, employees and appropriate campus-level. Contacts may include other colleges, Accounting Services, Employee Compensation and Benefit Services (EC&BS), Employee Trust Funds (ETF), Office of Human Resources (OHR), other state agencies and private business representatives.
4. Coordinate with division HR leadership team to review, discuss, and resolve payroll issues and policies and procedures and ensure that they are communicated effectively within HR and divisional departments.

What SJD would you map this employee to and why?

How did you find this SJD?

### What If...

1. An employee's current job description is not accurate?

*If a job description is inaccurate, it should be updated by following current business processes. Reference other documentation to validate employee responsibilities on 11/7/21. If there are future-expected changes to their job responsibilities, those changes follow the standard business practice to updating a title.*

2. An employee's job is split between multiple roles?

*SJD may not describe an employee's job perfectly. But is it close enough? We're looking for best fit.*

*Use the "Job posting" test – if this employee left today, how would you post for this position? E.g. data scientist who has web development duties. Would you be hiring for a data scientist or a web developer?*

*Ask yourself if there is an organization need—what organizational need is this job meeting? What is the essence of this job? Don't be too concerned with the day-to-day tasks, but focus on the core functions it serves in the organization.*

3. No title/standard job description exists for a current job?

*Consult with UWS Human Resources [TTC@uwsa.edu](mailto:TTC@uwsa.edu).*

## The Ask (Slides 26 – 28)

TITLE AND TOTAL COMPENSATION PROJECT

**Role of a Panel Member** Pg. 21

Panel members...

- Are not meant to represent the employee, but rather to find the best fit SID
- Must aim to be fair and unbiased
- Must take into account organizational structure and potential inequities as a result of a recommendation

**Considerations for panel member recusal/removal to discuss with HR**

When the potential panel member...

- Has a personal interest in the outcome
- Has an appeal pending

Or when...

- A panel decision would directly impact the panel member, e.g. a job in the same or similar role

Or...

- There is a personal or professional connection to the appellant, e.g. subordinate employee/supervisor relationship, or same work unit

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TITLE AND TOTAL COMPENSATION PROJECT

**The Ask** Pg. 22

**Review Title Appeals for:**

- ✓ Relevant and compelling documentation
- ✓ Work specific language
- ✓ Appropriate Education, Experience, Certifications & Licenses
- ✓ Adequate differentiation in work complexity as distinguished by summary and responsibilities
- ✓ Reasonable representation of position in the organization

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TITLE AND TOTAL COMPENSATION PROJECT

**The Standard of Review** Pg. 22

The employee filing the appeal has the responsibility for submitting the necessary documentation for review.

HR may supplement the submitted documents as appropriate during the panel review.

Documentation must present clear and convincing evidence that a different title of record is a better fit for the position.

*NOTE: Job data for employees at other campuses cannot be used as relevant documentation due to variations in organizational structure at different universities, divisions, and work units.*

*NOTE: Personal correspondence cannot be used as supporting documentation; the panel should be considering official documentation of job responsibilities*

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### The Role of a Panel Member

Panel members...

- Are not meant to represent the employee, but rather to find the best fit SJD
- Must aim to be fair and unbiased
- Must take into account organizational structure and potential inequities as a result of a recommendation

## Considerations for panel member recusal/removal to discuss with HR

When the potential panel member...

- Has a personal interest in the outcome
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Or when...

- A panel decision would directly impact the panel member, e.g. a job in the same or similar role

Or...

- There is a personal or professional connection to the appellant, e.g. subordinate employee/supervisor relationship, or same work unit

## The Ask

We ask that you review title appeals for:

- ✓ Relevant and compelling documentation
- ✓ Work specific language
- ✓ Appropriate Education, Experience, Certifications & Licenses
- ✓ Adequate differentiation in work complexity as distinguished by summary and responsibilities
- ✓ Reasonable representation of position in the organization

## The Standard of Review

The employee filing the title appeal may work with their institution Human Resources to gather the necessary documentation.

**Documentation must present clear and convincing evidence that a different title of record is a better fit for the position.**

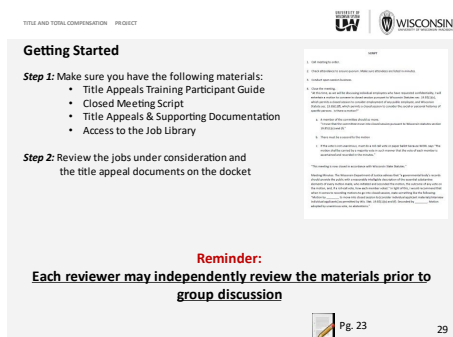
### Examples of Documentation

position description (If no formal PD, employee works with supervisor to validate what the employee does)

- standard job description (current assigned and proposed)
- original job posting
- hiring letter/offer letter
- performance reviews
- organizational chart
- other relevant documentation

Job data for employees at other campuses cannot be used as relevant documentation due to variations in organizational structure at different universities, divisions, and work units.

## Getting Started (Slides 29 – 34)



TITLE AND TOTAL COMPENSATION PROJECT

UNIVERSITY OF WISCONSIN

### Getting Started

**Step 1:** Make sure you have the following materials:

- Title Appeals Training Participant Guide
- Closed Meeting Script
- Title Appeals & Supporting Documentation
- Access to the Job Library

**Step 2:** Review the jobs under consideration and the title appeal documents on the docket

**Reminder:**  
Each reviewer may independently review the materials prior to group discussion

Fig. 23 29

Now we will talk about the format and process for completing your review.

Preparation for the review process is important.

It is highly recommended that before you start your review, you...

- *Read through all the title appeal documentation,*
- *Download and review the potentially applicable standard job descriptions,*  
*and,*
- *Write down your thoughts before convening with the group.*

Consult your HR team for specifics on your title appeals panel process and documentation.



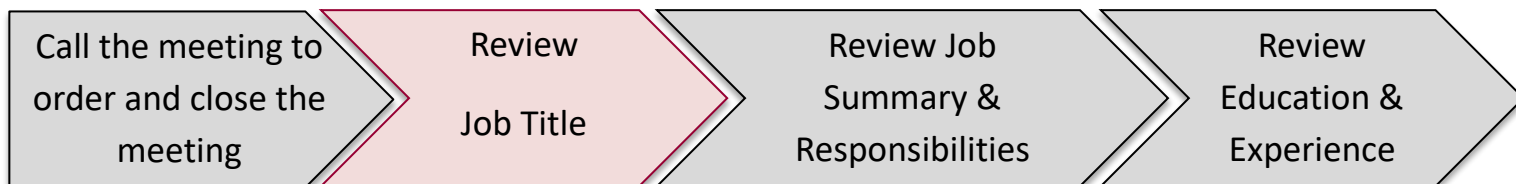
**Section Questions:**

- What is the date for the panel review, 1 session or multiple sessions?

**Steps to Complete:**

1. Publish appeal notice posted in advance
2. Ensure someone volunteers to take notes
3. Choose someone to lead the panel discussion and pace the review
4. Start the meeting and close the session

Reference the **Closed Meeting Script** resource document.



**Section Questions:**

- How well does this job title match what you would expect this job to be called in a higher education setting based on the applicant's current title and description of responsibilities?
- How well does it fit when compared to the title proposed by the appellant? Does HR have additional suggestions?

**Steps to Complete:**

1. Read the employee's justification, position description (PD), supporting documents, the proposed SJD job summary and responsibilities



2. Answer the question: ***How well does this job title match what you would expect this job to be called in a higher education setting?***

Do not compare the jobs from within one institution to another, as each institution, and many times schools/colleges/divisions, have unique organizational structures



### Section Questions:

- How well does the summary & responsibilities give an accurate assessment of scope and responsibility?
- How suitable are the responsibility statements for the current title?
- Are there any important responsibilities that seem to be missing?
- If yes, what responsibilities are missing from this job description?

### Steps to Complete:

1. Read the employee's justification, position description (PD), supporting documents, the proposed SJD job summary and responsibilities
2. Answer the question: ***Are there any important responsibilities that seem to be missing?***
3. If the title does not feel accurate, answer question: ***If relevant, what job title do you suggest might be a better fit?***

\*More tasks do not equate to different or "higher" level job description\*

\*Employee must do all the responsibilities in the job description. They can do more than what is in the job responsibilities, but not less.\*

**Section Question:**

- Please review the combinations of education and experience that represent the minimum, typical and preferred qualifications for the position.

**Steps to Complete:**

1. Read the employee's justification, position description (PD), supporting documents, the proposed SJD job summary and responsibilities
2. Answer the question: ***does the employee's education and experience meet the minimum preferences or requirements in the standard job description?***

The minimum preferred education represents the systemwide shared minimum elements of each job description. When posting for an open position, universities can add additional requirements or preferences to their specific recruitment.

**Minimum:** The most basic combination of education and experience necessary to perform the work.

**Preferred:** The most desired combination of education and experience ideally held to perform the work.

**Required:** The, in most cases, state mandated minimum combination of education and experience to perform the work.

**FINAL STEP**

**Provide a recommendation to the Final Arbitrator/Decision-Maker in the Title Appeals Process. Include Justification and specific examples.**

## Additional Considerations (Slides 35 – 38)

TITLE AND TOTAL COMPENSATION PROJECT

**Scaling** Pg. 27

**What is scaling?**  
Scaling further refines the market pricing for a job based on a set of peers with similar size (staff full time equivalency FTE) and expenditures. Scaling is not title progression.

**How is scaling applied?**  
Each UW System institution uses a job code and modified titles for certain jobs that are scaled – either A, B, or C. If there is a scaled job available, the institution should choose that job for their employees.

Title	TTC Title
ASSISTANT DEAN/L	Assistant Dean
ASSISTANT DEAN/M	Assistant Dean (B)
ASSISTANT DEAN/S	Assistant Dean (C)

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TITLE AND TOTAL COMPENSATION PROJECT

**Scaling Key** Pg. 28

UW Institution Scaling Key		
A	B	C
UW System Administration	UW-Eau Claire	UW-Green Bay
UW-Madison	UW-La Crosse	UW-River Falls
UW-Milwaukee	UW-Oshkosh	UW-Parkside
	UW-Platteville	UW-Superior
	UW-Sevens Point	
	UW-Stout	
	UW-Whitewater	

**Institutions that are A**, can use B or C titles for their smaller colleges/divisions/departments based on a size(staff full time equivalency FTE) and expenditures comparison.

**Institutions that are B**, can use C titles for their smaller colleges/divisions/departments based on a size(staff full time equivalency FTE) and expenditures comparison.

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### What is scaling?

Scaling further refines the market pricing for a job based on a set of peers with similar size (staff full time equivalency FTE) and expenditures. Scaling is not title progression.

Scaling Example	
<b>Title</b>	TTC Title
<b>ASSISTANT DEAN/L</b>	Assistant Dean
<b>ASSISTANT DEAN/M</b>	Assistant Dean (B)
<b>ASSISTANT DEAN/S</b>	Assistant Dean (C)

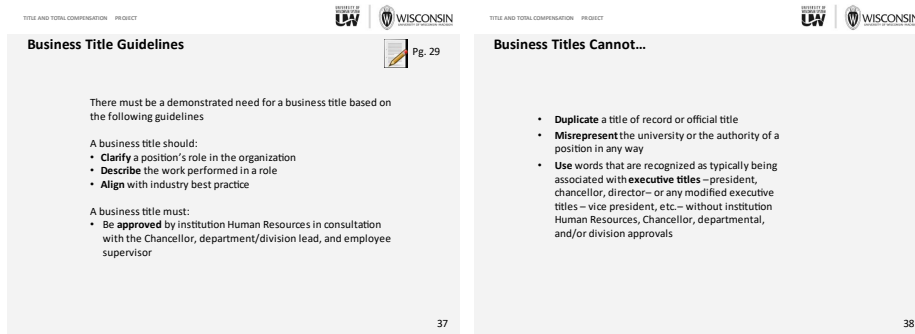
### How is scaling applied?

Each UW System institution uses a job code and modified titles for certain jobs that are scaled – either A, B, or C. If there is a scaled job available, the institution should choose that job for their employees.

UW Institution Scaling Key		
A	B	C
UW System Administration	UW-Eau Claire	UW-Green Bay
UW-Madison	UW-La Crosse	UW-River Falls
UW-Milwaukee	UW-Oshkosh	UW-Parkside
	UW-Platteville	UW-Superior
	UW-Stevens Point	
	UW-Stout	
	UW-Whitewater	

**Institutions that are A**, can use B or C titles for their smaller colleges/divisions/departments based on a size (staff full time equivalency FTE) and expenditures comparison.

**Institutions that are B**, can use C titles for their smaller colleges/divisions/departments based on a size (staff full time equivalency FTE) and expenditures comparison.



Some institutions are using business titles. Business titles cannot be appealed. There is a separate business process through HR for establishing business titles. We want to give you the guidelines for business titles to clarify how these were determined.

There must be a demonstrated need for a business title based on the following guidelines

A business title should:

- **Clarify** a position's role in the organization
- **Describe** the work performed in a role
- **Align** with industry best practice

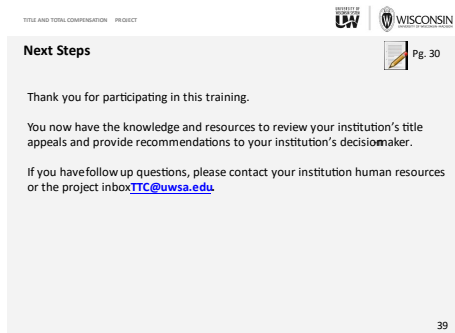
A business title must:

- Be **approved** by institution Human Resources in consultation with the Chancellor, department/division lead, and employee supervisor

Business Titles Cannot...

- **Duplicate** a title of record or official title
- **Misrepresent** the university or the authority of a position in any way
- **Use** words that are recognized as typically being associated with **executive titles** – president, chancellor, director – or any modified executive titles – vice president, etc. – without institution Human Resources, Chancellor, departmental, and/or division approvals


## Next Steps (Slide 39)



The screenshot shows a slide titled "Next Steps" with the following content:

TITLE AND TOTAL COMPENSATION PROJECT

UNIVERSITY OF WISCONSIN WISCONSIN

**Next Steps**  Pg. 30

Thank you for participating in this training.

You now have the knowledge and resources to review your institution's title appeals and provide recommendations to your institution's decisionmaker.

If you have follow up questions, please contact your institution human resources or the project inbox [TTC@uwsa.edu](mailto:TTC@uwsa.edu).

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Thank you for participating in this training.

You now have the knowledge and resources to review your institution's title appeals and provide recommendations to your institution's decision-maker.

If you have follow-up questions, please contact your institution human resources or the project inbox [TTC@uwsa.edu](mailto:TTC@uwsa.edu).

<https://www.wisconsin.edu/ohrwd/title-and-total-compensation-study/>