



## **Title and Total Compensation Study August & September 2018**

Colleagues,

The Advisory Council meeting for August was cancelled and an *Advisory Council Summit* was held on **Tuesday, September 11<sup>th</sup>, 2018, 1:30 pm to 5:00 pm at 21 North Park St., Madison.**

The Summit was an opportunity to celebrate our accomplishments to date while highlighting our focus on the future. New Advisory Council members were provided an opportunity to meet and greet current members, acquaint themselves with the project timeline and better understand the amount of effort needed to continue our support of this monumental undertaking and redesign of our compensation and titling structures.

The afternoon included:

- An overview of the work completed to date
- An updated project timeline
- An overview of purpose and involvement in upcoming project phases
- A demonstration of collaborative technology
- Review of expanded expectations for Advisory Council members
- Discussion: An employee feedback opportunity via the upcoming benefit preferences questionnaire

If you have any questions, please contact us at [TTC@uwsa.edu](mailto:TTC@uwsa.edu).

**TTC Planning Team**  
University of Wisconsin System  
UW-Madison

**TITLE AND TOTAL COMPENSATION PROJECT**

# **ADVISORY COUNCIL SUMMIT**

**9/11/18**

# Agenda

1. Welcome and Introductions
2. Human Resources Vision, Benefits & Philosophy
3. Project Recalibration Details
4. Job Descriptions & Compensation Infrastructure Development
5. Benefits Strategy Development
6. Next Steps
7. Change Management
8. Advisory Council Role

# Welcome & Introduction



**Mark Mone,  
Chancellor of the University of  
Wisconsin-Milwaukee**

## In Your Own Words

- Based on your understanding, describe how you view the current TTC project efforts
- What challenges do we face as we move forward?

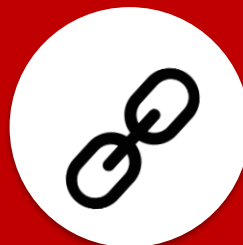
# Human Resources Vision

## Well Defined Human Resource Management Strategy



- Reduced barriers to sharing resources
- Reduced unnecessary variation in employee policy and practice
- Enrichment of team members by providing programs to develop and build the necessary skills, abilities and capacity needed to lead the organization
- Attraction and retention of the best and brightest employees who are aligned with common core values and behaviors

## Unified Total Compensation Vision and Strategy



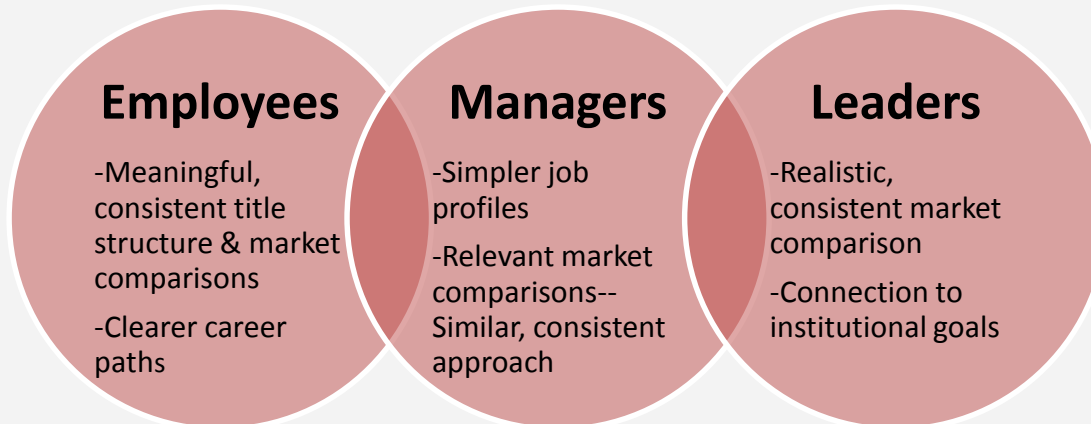
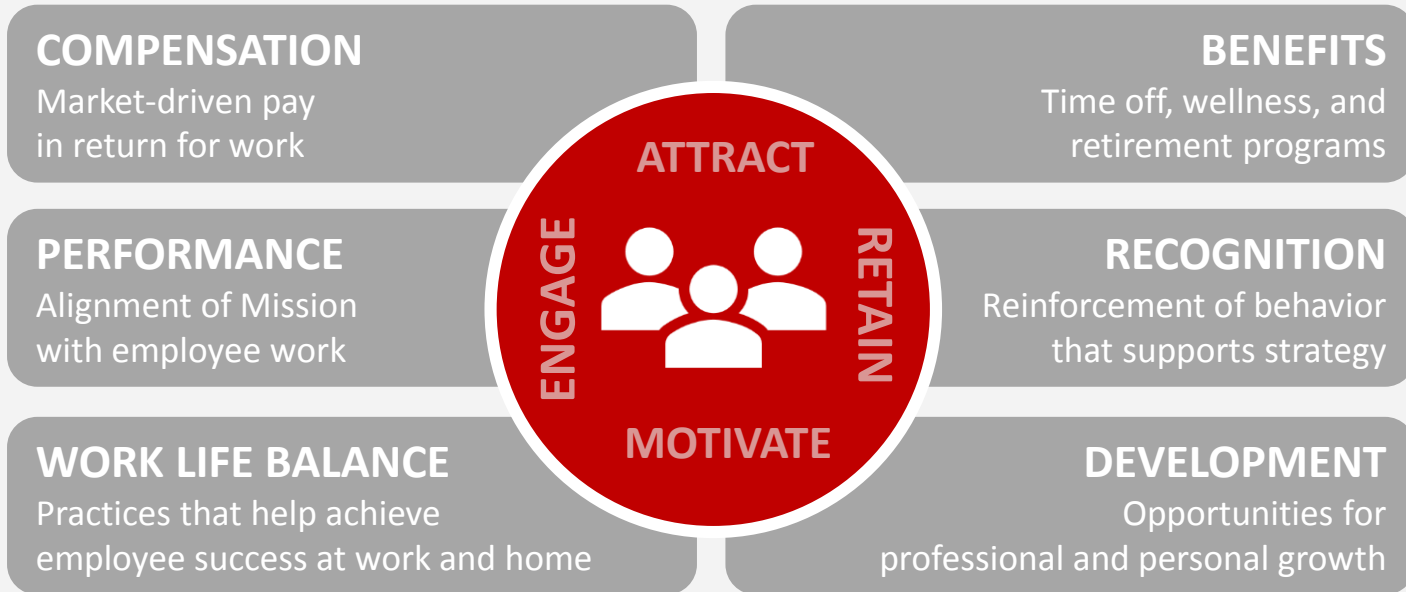
- A total rewards strategy that is market competitive, considers changing workforce demographics, is valued by team members and meets institutional needs
- Total rewards structure and programs that ensure a controllable and sustainable cost structure
- A thoughtful recalibrated process and sequence for implementation of the total rewards strategy aligned with HR strategy

## Efficient and Effective Human Resources Operating Model

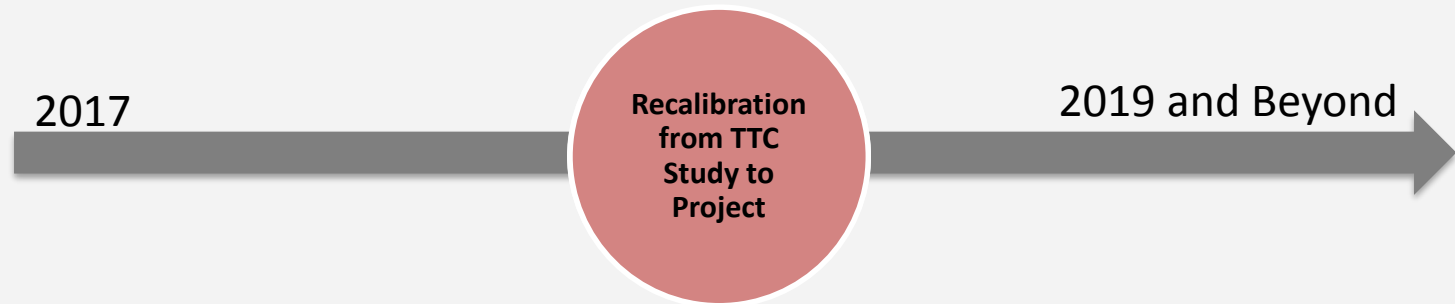


- An optimal organization design aligned with efficient and effective human resource services, functions and business processes
- Elimination of unnecessary variation and duplication of services, roles and responsibilities
- Deployment of human resources management technology enablers that promote efficiency and reduce costs

# Benefits of the TTC Project



# TTC Project Recalibration



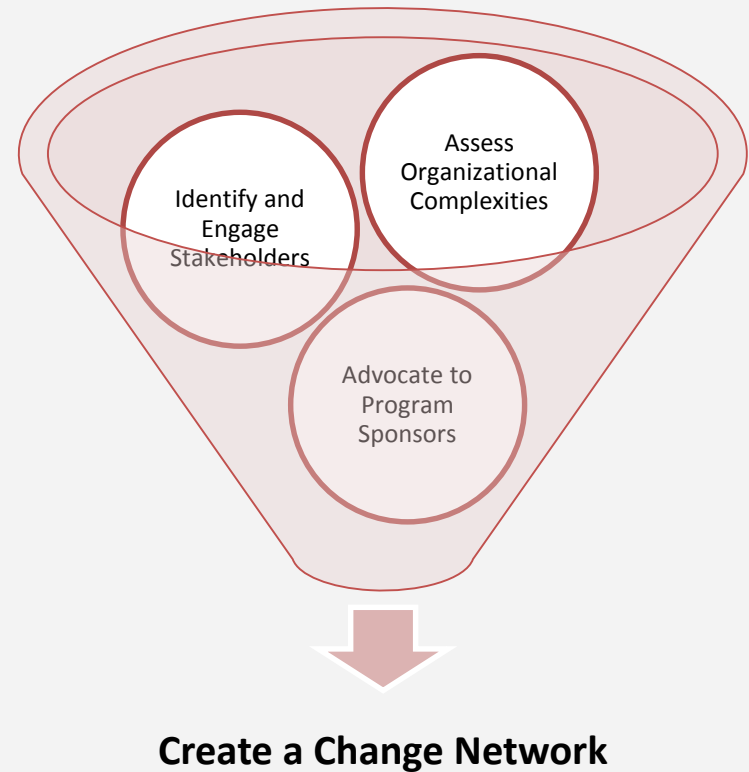
## How the TTC Project evolved from the TTC Study

- The TTC Study began by reviewing current state (titles, compensation and benefits programs) and identifying a new job framework
- The TTC effort has evolved into a TTC Project incorporating what we learned over the last year and ultimately moving towards a holistic project plan
- The goal of the TTC remains the same: creating and implementing new title, compensation, and benefits programs for the UW

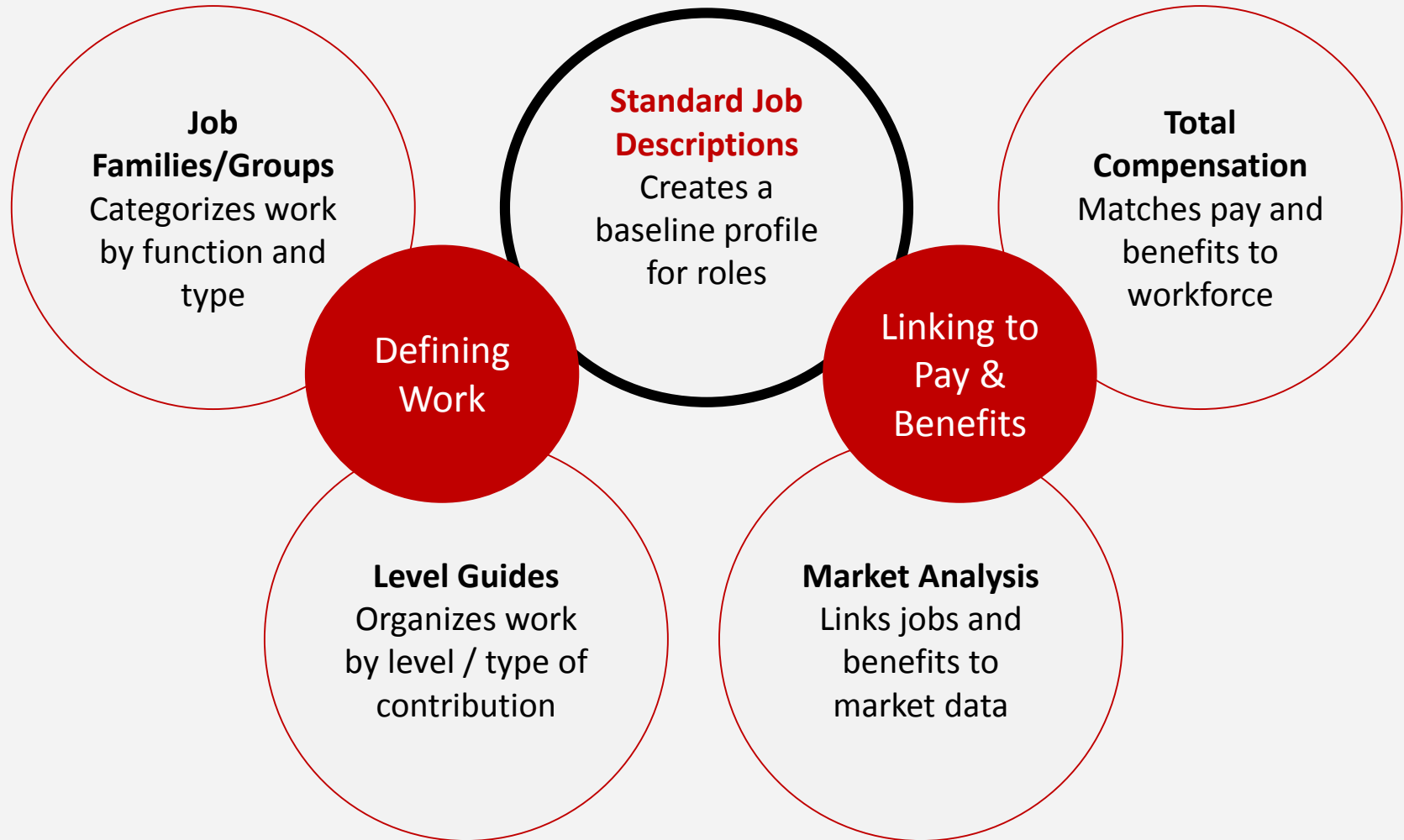


# Recalibration Activities

- Reviewing and updating the project plan, activities and timeline
  - Additional work steps identified that are crucial to successful implementation and sustainability identified
- Identified resources and process improvements to respond to standard job description (SJDs) completion
  - Created process to ensure consistent outcomes with validation checkpoints
  - Adjusted timeline for standard job descriptions (SJDs) completion



# Core Components Focus



# Compensation Philosophy Blueprint

## Influencing Factors

ORGANIZATIONAL  
STRATEGY

ORGANIZATIONAL  
STRUCTURE

TALENT NEEDS & MARKET  
INFLUENCES

## Total Compensation Components

Program  
Guiding  
Principles

Market  
References &  
Pay Positioning

Program  
Components &  
Administration

Communication  
& Transparency

Oversight &  
Accountability

# Philosophy Supporting Components

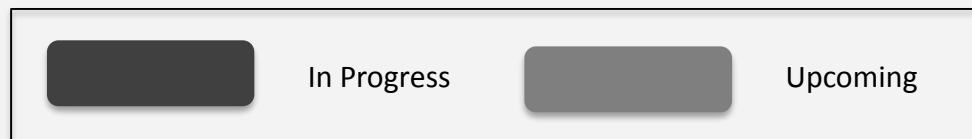
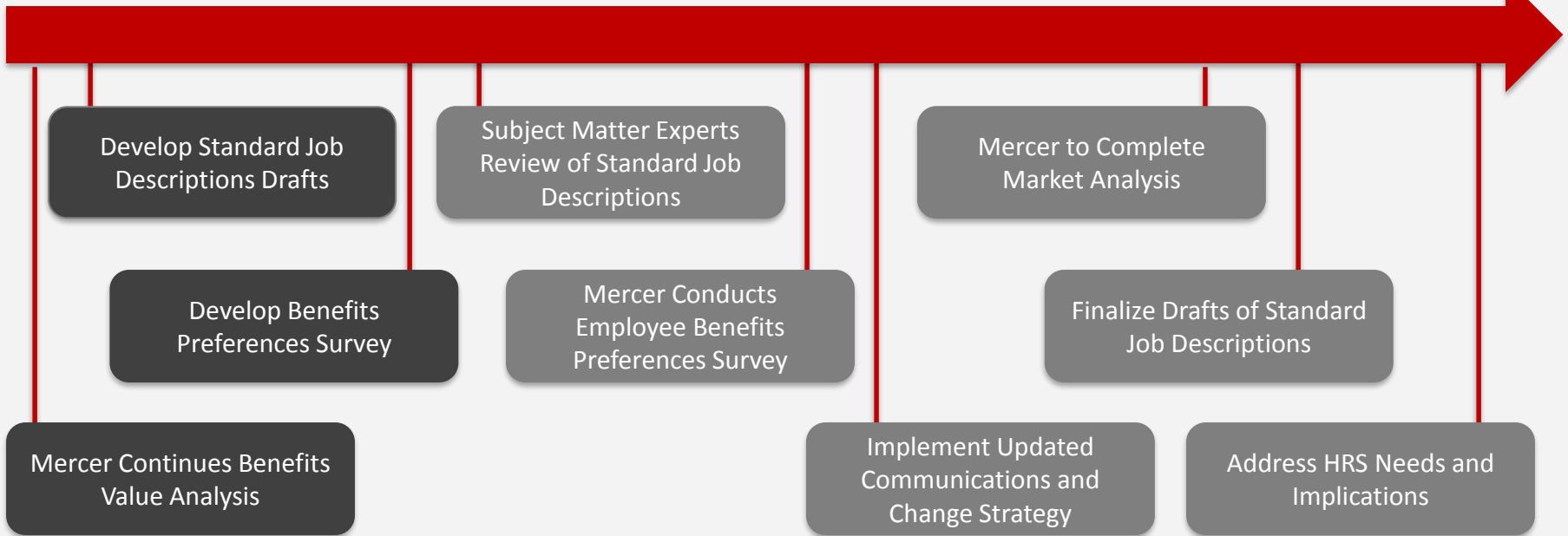
Component	Definition	Role
Base Pay	Primary form of monetary rewards, established based on market value of the job's responsibilities and requirements as well as internal equity	<ul style="list-style-type: none"> <li>• Payment for sustained contributions within a job as continued development and demonstration of necessary knowledge, skills, and competencies.</li> </ul>
Benefits & Services	Programs that support the health and security of employees – may include health and welfare benefits, retirement, work life programs, and other voluntary programs	<ul style="list-style-type: none"> <li>• Benefits play a key role in the overall rewards package and provide a way for organizations to differentiate their rewards offerings.</li> </ul>
Performance/ Merit Award	Reward for meritorious performance in achieving role accountabilities	<ul style="list-style-type: none"> <li>• Merit increases to base salaries are used to reward proficiency in job responsibilities, sustained contributions, and to maintain competitiveness.</li> <li>• Lump sum payments are used in lieu of a salary increase when an increase is not appropriate, such as when a salary is at-or-over the range maximum.</li> </ul>
Career	Reward employees by providing opportunities to learn, grow, and develop professionally	<ul style="list-style-type: none"> <li>• Illuminate and advertise opportunities for advancement and learning at all career stages.</li> </ul>

# Current Project Work

## TTC Project Timeline

August 2018

January 2019



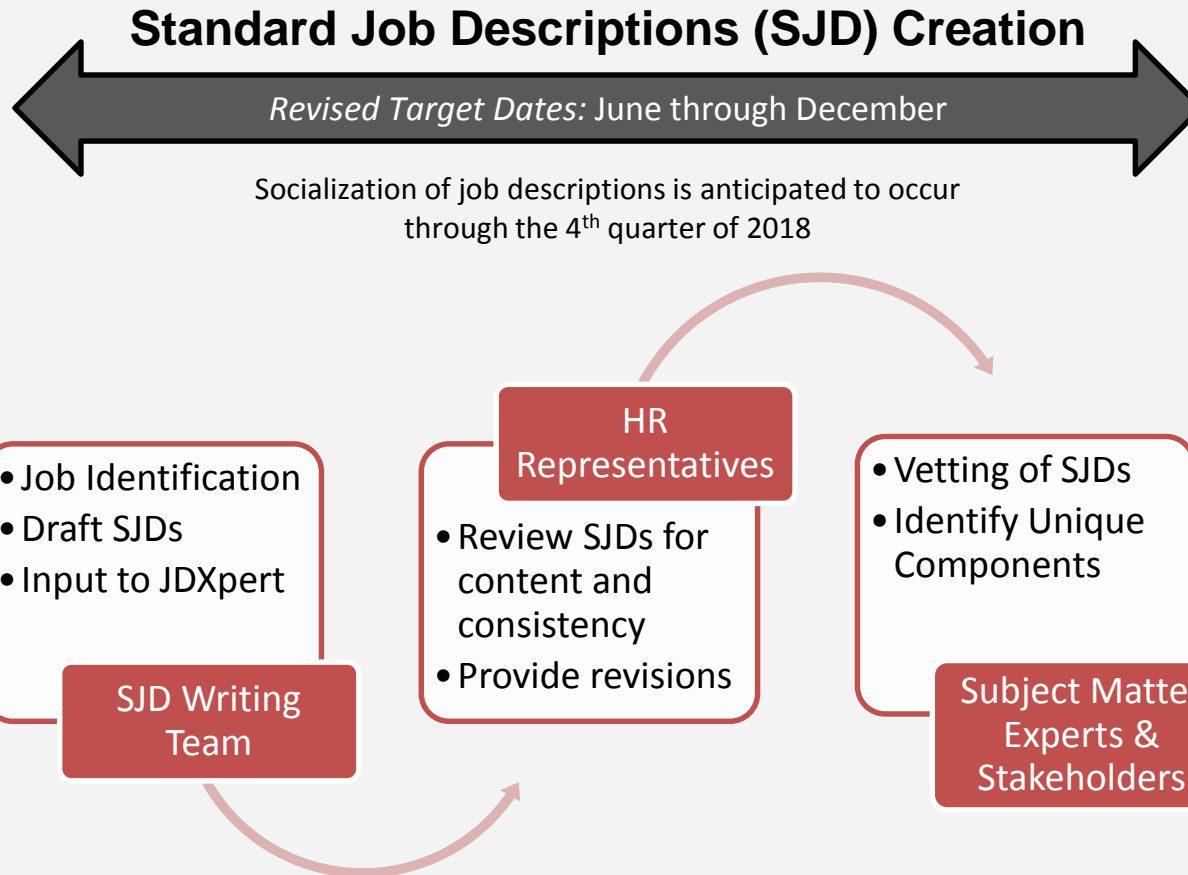
# Job Titles & Standard Description Development

As a result of the project recalibration, the method for creating standard job descriptions was enhanced

## Enhanced SJD Plan

- Reviewed sample job descriptions
- Developed a hybrid approach to develop standard job descriptions
- Developed a job writing guide
- Established a job writing team
- Recalibrated with stakeholders who had begun drafting standard job descriptions
- Established quality review steps to include review by subject matter experts familiar with the work

# Standard Job Description Creation and Revision Process



# Standard Job Description Overview

**Why:**  
 Today, many of our descriptions are out of date, long, and don't clearly show the work employees do.



**Definition:**  
 A standard job description represents work that is core to the job, commonly done in the role, and regularly needed within the institution. The majority of the work done by an employee will be described via their standard job description.

**Charge:**  
 Standardize the format and components of job descriptions, so they are consistent, clear, and concise.

## Standard Job Descriptions include...

Summary	<ul style="list-style-type: none"> <li>• A <b>clear, concise</b> statement explaining the major functions of the position</li> <li>• Describes the overall end-result of the work that the job produces and why it exists</li> <li>• <b>1-2 sentences</b> to give an overview of the job's main purpose</li> </ul>
Responsibilities	<ul style="list-style-type: none"> <li>• Brief statements indicating what the major work responsibilities are and why they are taken.</li> <li>• Typically <b>4-7 responsibilities</b> listed</li> </ul>

## They do NOT include...

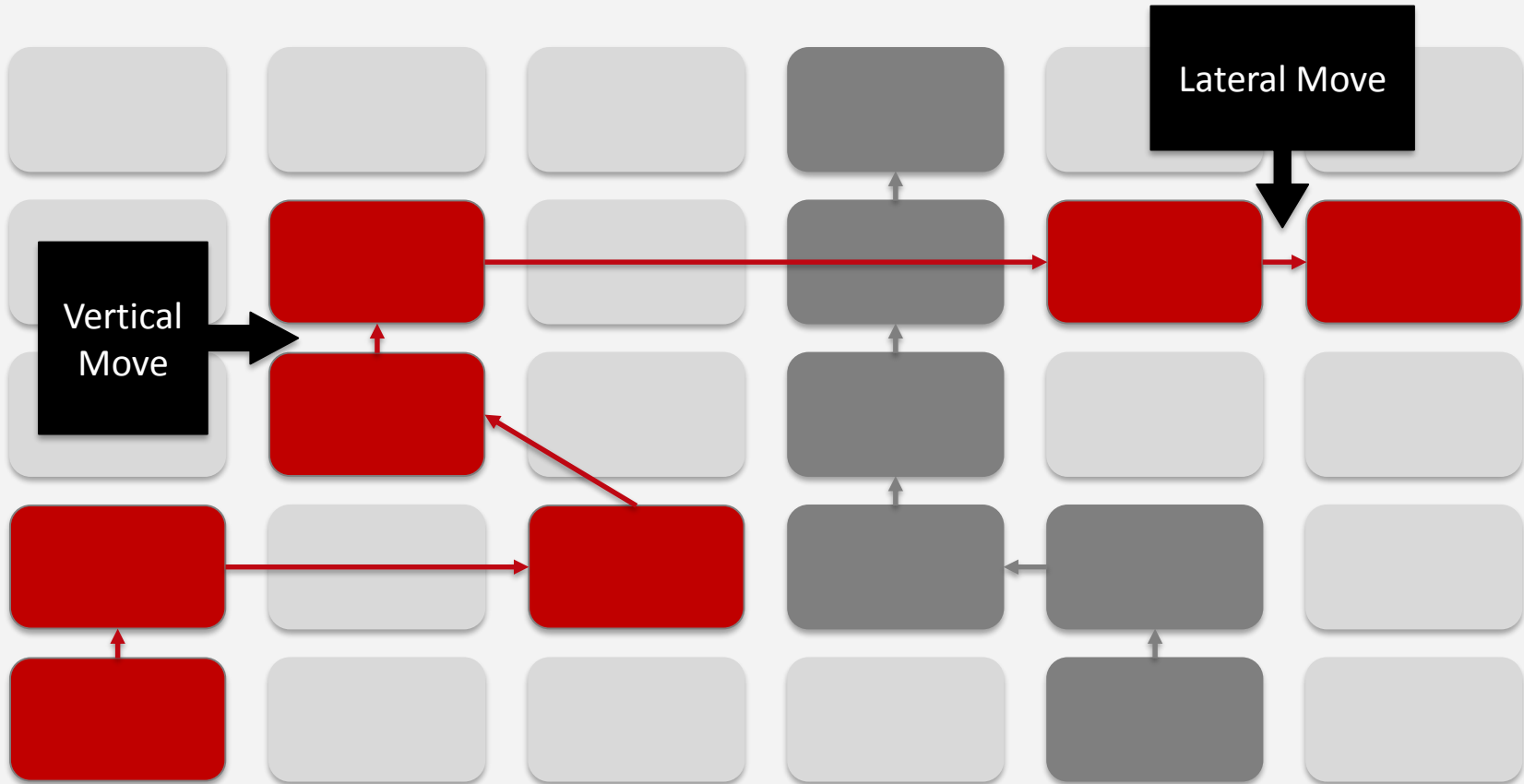
-  Long lists of tasks
-  Every possible responsibility the job title may have

Tasks are identified in supplementary personnel materials (e.g. performance management expectations, standard operating procedures).



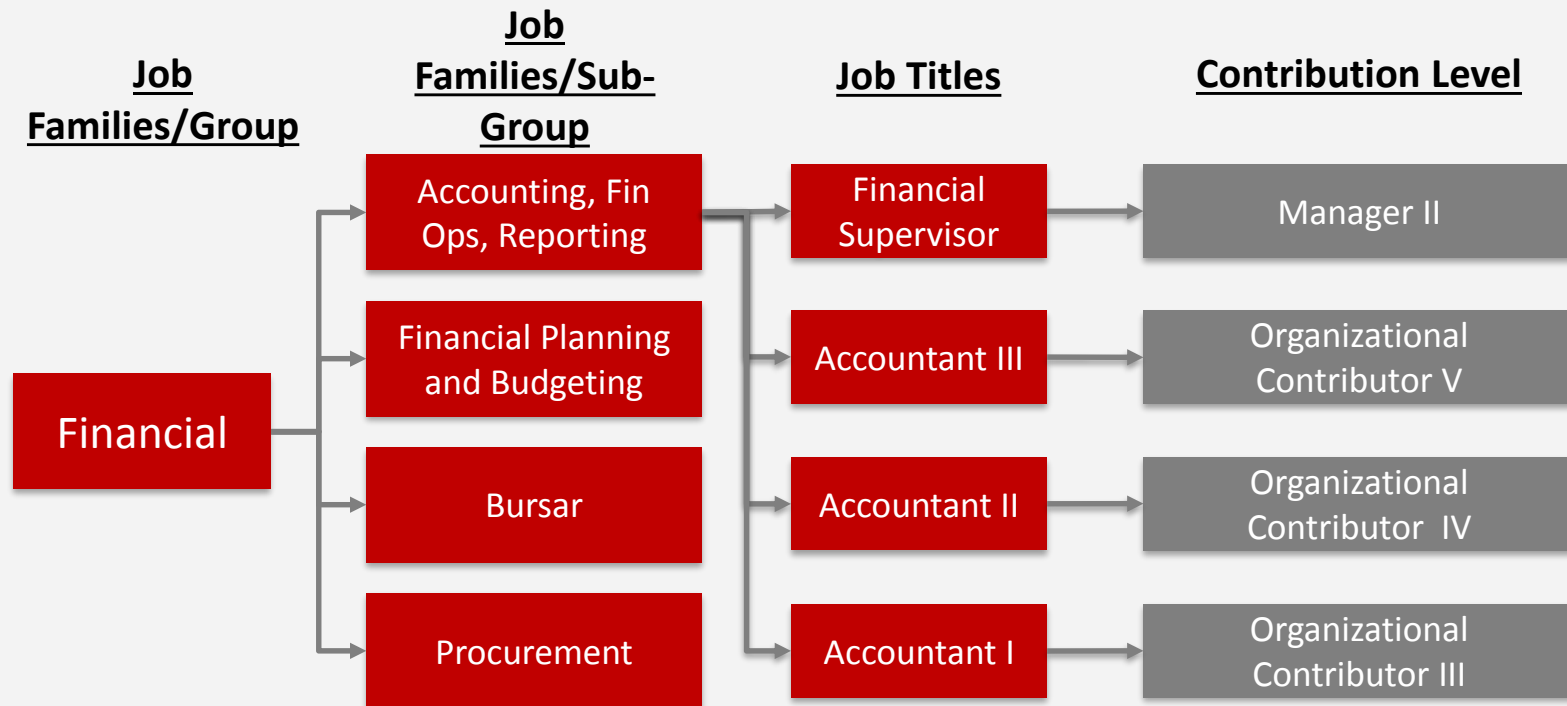
# Career Path Opportunities

Employees have the ability to move laterally or vertically across jobs. Standard Job Descriptions will define what jobs do and qualifications for career planning.



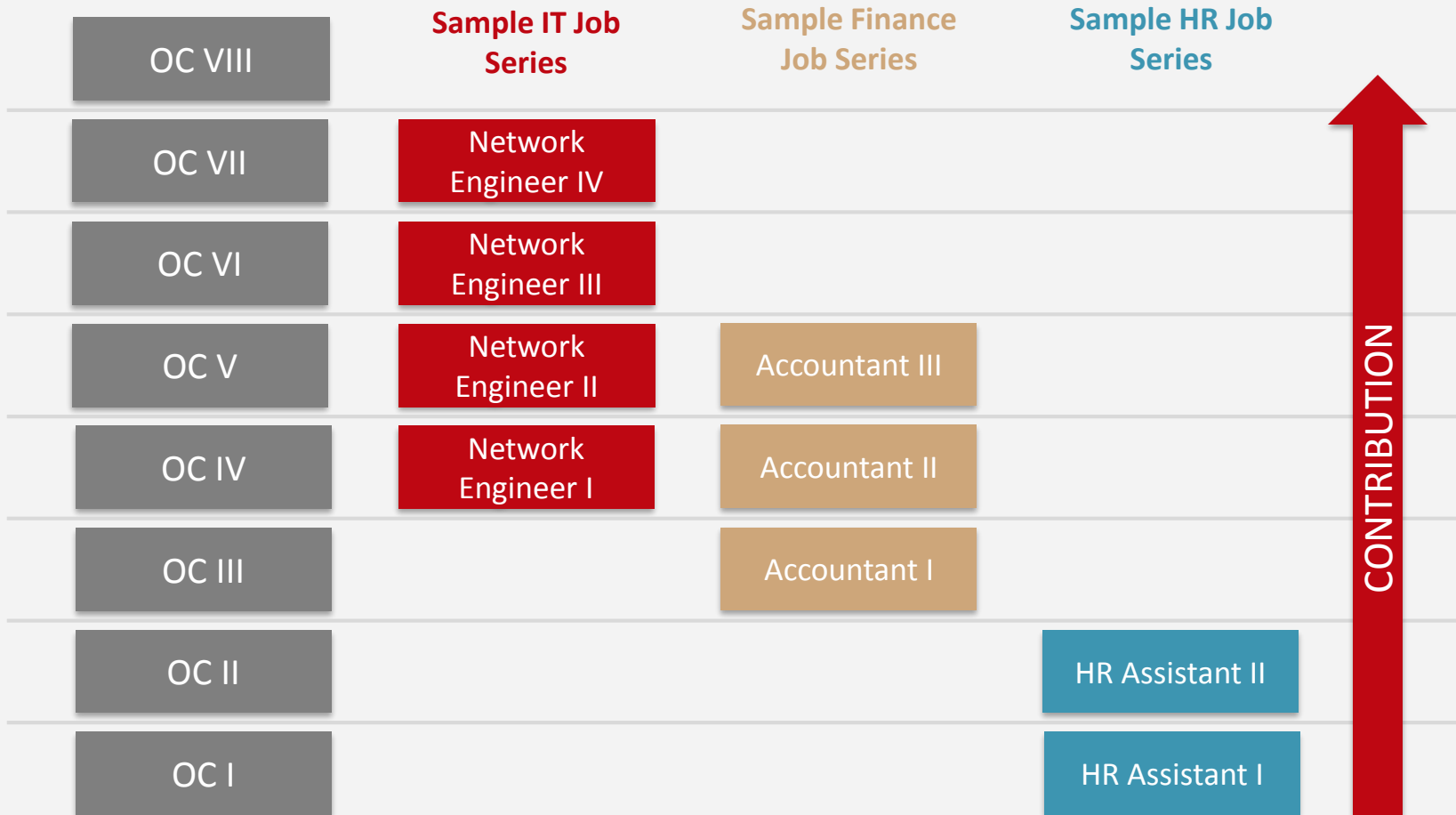
# Job Framework

The Project introduces a common job framework across all institutions to organize jobs based on similar nature and complexity of work. All jobs within a framework are organized by a combination of Job Families/Groups, Sub-Families/Groups, and Contribution Levels, resulting in multiple career paths.



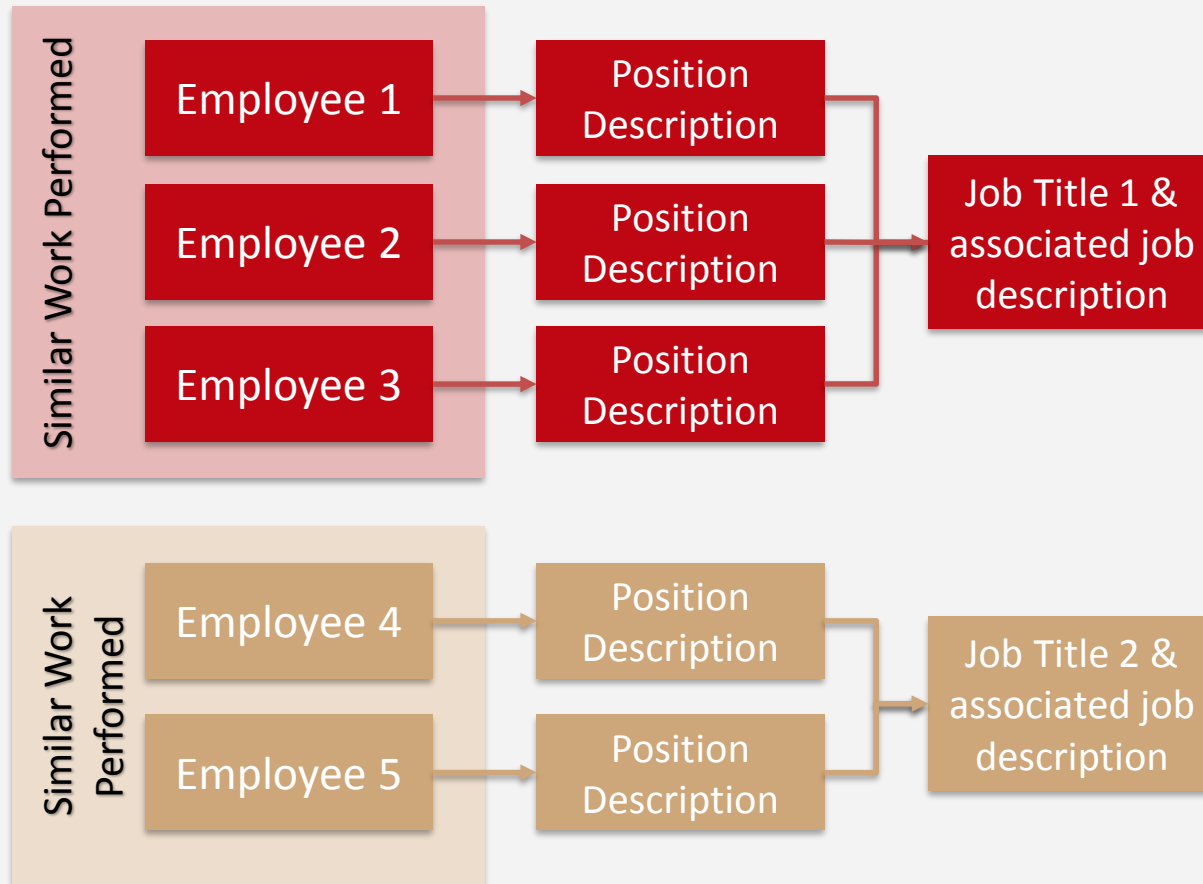
# Job Series - Levels

A **job series** is a sequence of levels within a job title structure demonstrating noticeable complexity differences. Job series levels across different job families/groups do not tie directly to the career level framework.



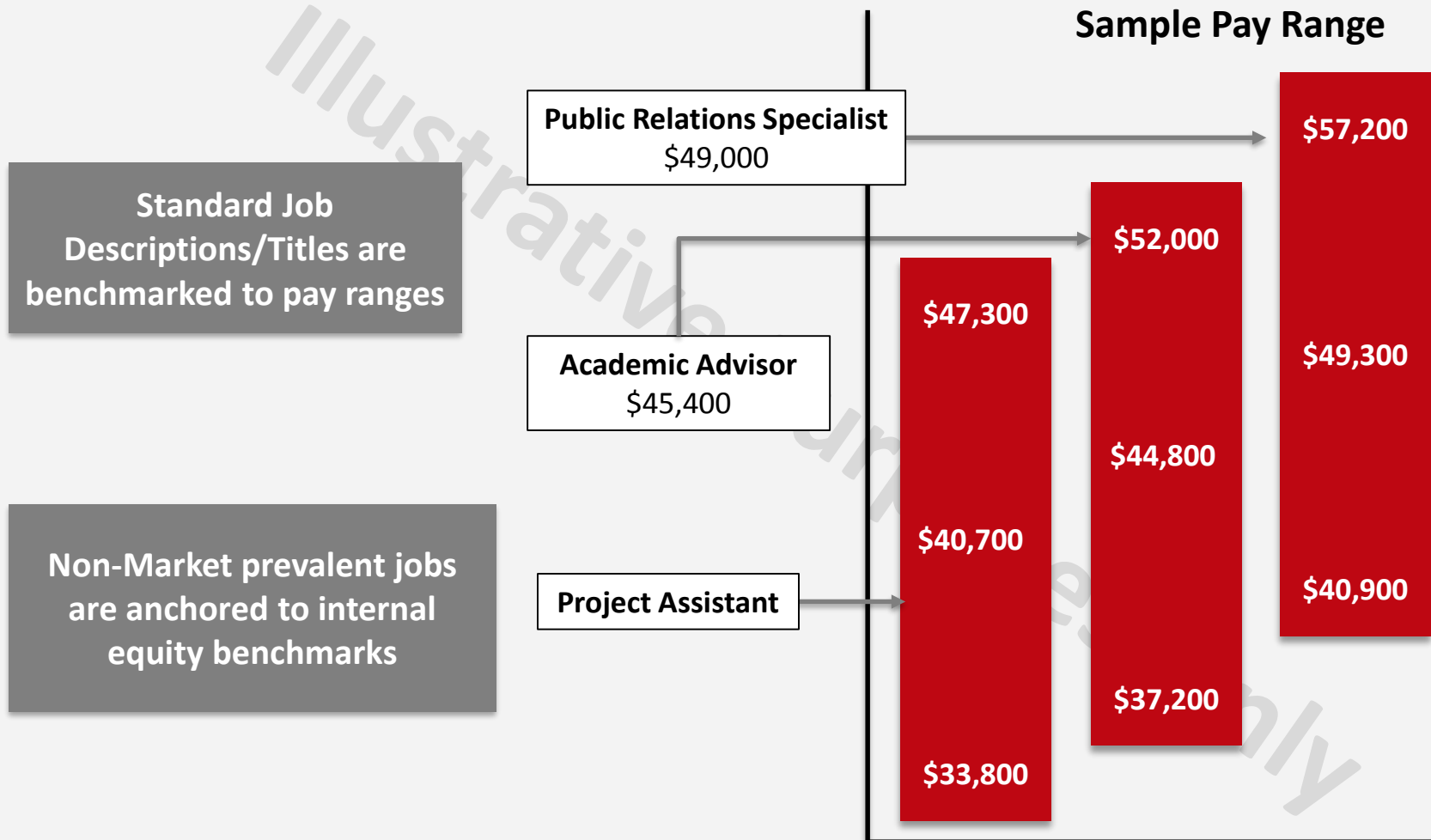
# Employee Mapping

Employees/positions will be mapped to a standard job title based on the core work that they perform and the associated market-based standard job description. Stakeholders will participate in the review of initial assignments. ***This will be an iterative process.***



# Pay Range Methodology

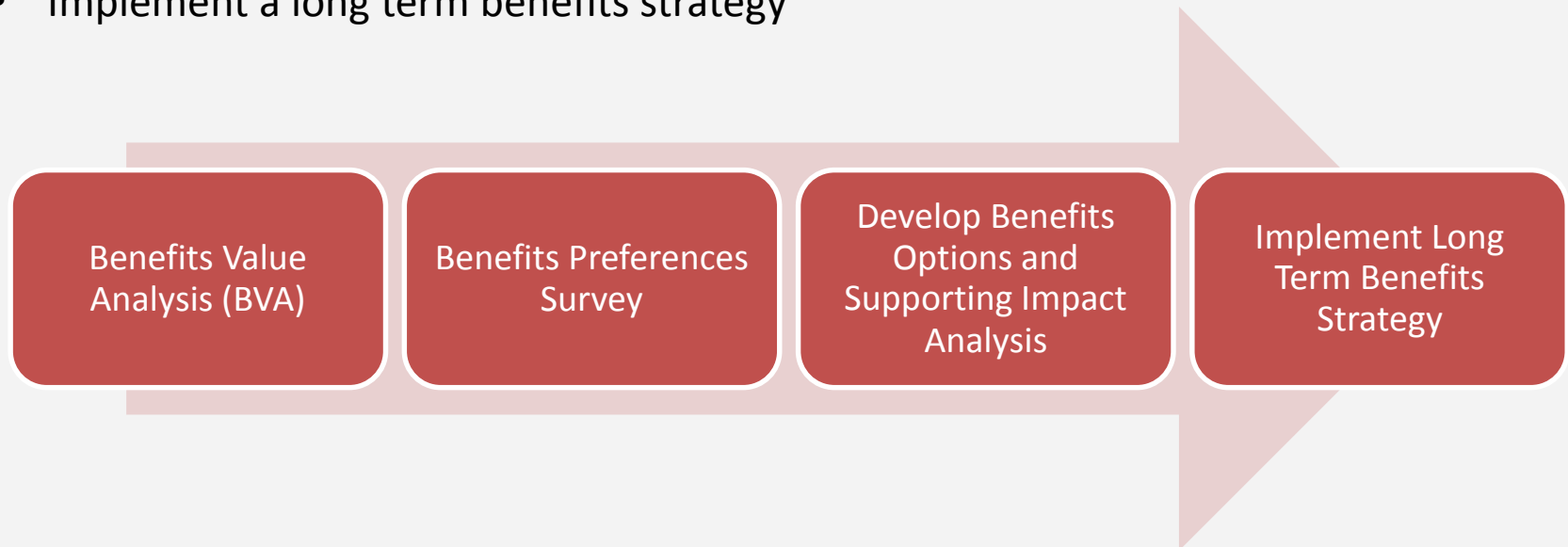
Jobs are assigned to pay range based on alignment of market data to established pay ranges.



# Benefits Strategy Preparation and Development

The Project includes an in-depth review benefits/work-life and leave structures to reshape benefits strategy. This includes:

- Conduct a leading practices and comparative analysis of value in the market place via the Benefits Value Analysis with Mercer Consulting
- Conduct the Benefits Preferences Survey with Mercer Consulting
- Develop options and conduct analysis to support recommendations
- Implement a long term benefits strategy



# Upcoming Spotlight: Benefits Preference Survey

## About:

This survey is designed to assess employee preferences regarding available benefits. The results of this survey will be used to evaluate employee benefit preferences and determine if current programs are meeting employees' diverse needs.

## Purpose:

To provide faculty and staff the opportunity to communicate their preferences and satisfaction with current benefits and share their desires for future benefit updates.

## Details:

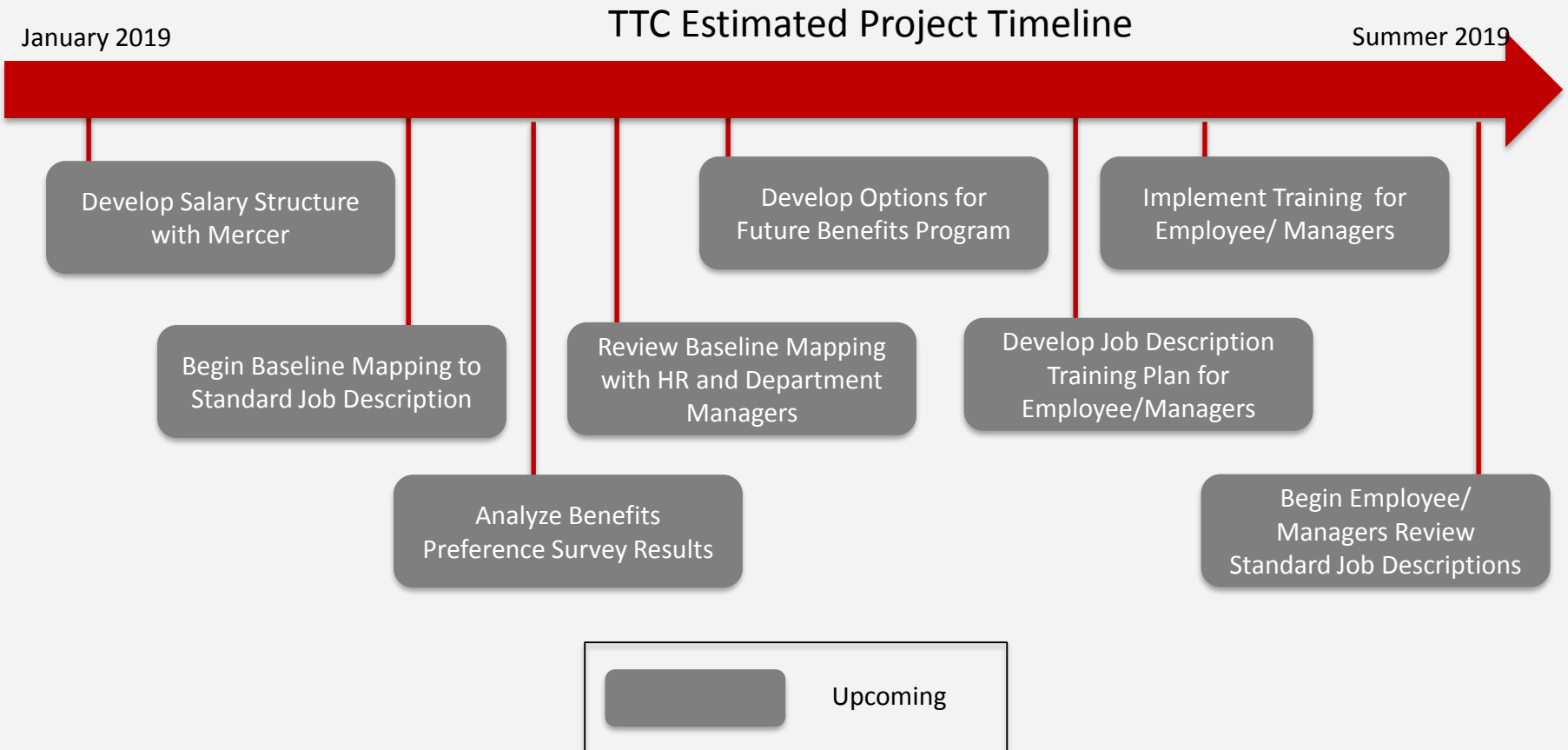
- All benefits eligible employees will have the opportunity to participate
- **Target survey dates are November 26, 2018 – December 14, 2018**
- Results anticipated in February, 2019
- Will be administered electronically with anonymous responses
- Translation sessions will be available

**Your Benefits**

Please indicate the degree to which you agree or disagree with the following statements.

	Strongly Disagree				
	Disagree				
	Neither Agree nor Disagree				
	Agree				
	Strongly Agree				
2. XYZ Co's benefits as a whole are as good as, or better than, the benefits offered by other companies in the local marketplace.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. The benefits offerings played a significant role in my decision to work at XYZ Co.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. The overall amount I pay for medical and prescription drug coverage (payroll deductions plus out-of-pocket expenses like deductibles and coinsurance) is reasonable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I would like to reduce the value of some benefits I receive in order to increase the value of other benefits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. The benefits offered by XYZ Co meet my needs (including those of my dependents, if applicable).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. I can easily find answers to questions I have about my XYZ Co benefits.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. XYZ Co does a good job communicating benefits information to employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Next Steps: January Through Summer 2019





# Change Management Approach

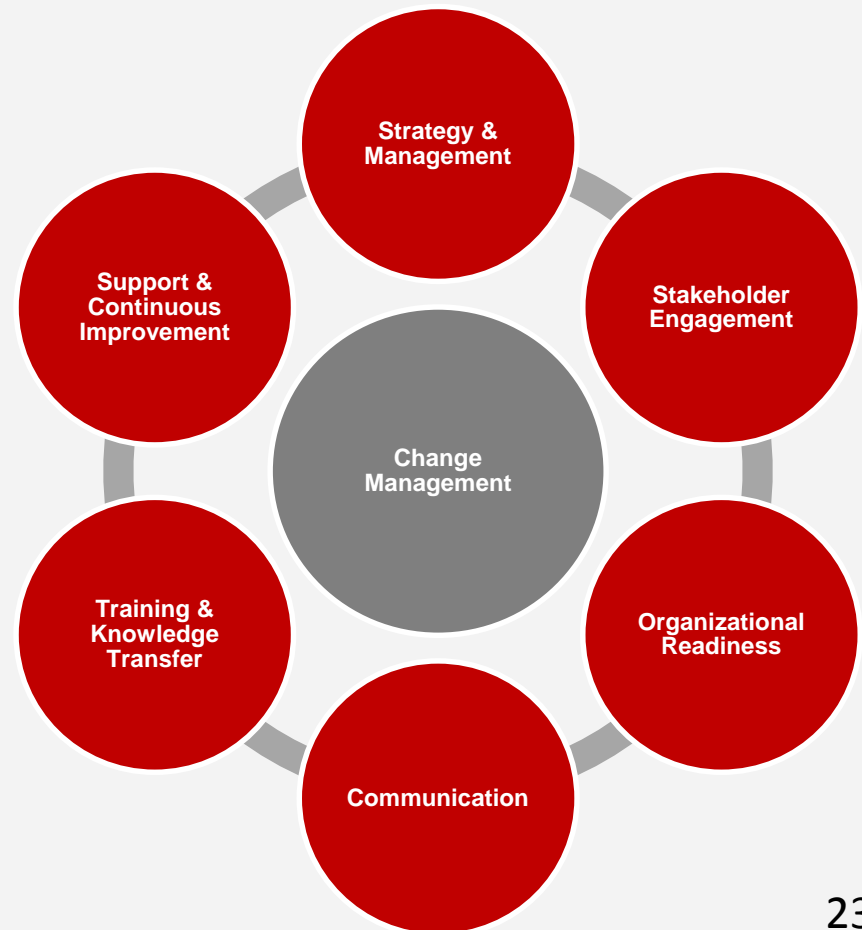
The TTC Project is cross-institution initiative that will transform the way UW attracts and retains its talent. Changes resulting from the Project will impact every employee at UW to varying degrees.

## Why Change Management

Change Management is the key to gaining acceptance and support needed for implementing sustained change. Our goal is to help individuals successfully transition from current conditions to future state.

## Effective Change Management:

- Works to establish expectations upfront
- Mitigates disruptions during the implementation
- Enables adoption, utilization, and proficiency



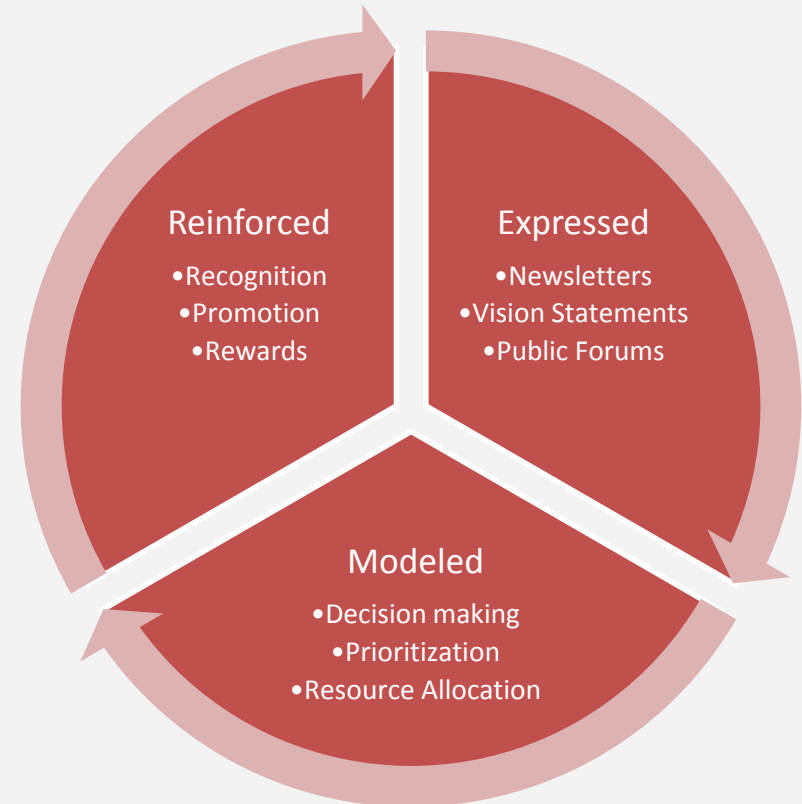
## Change Management – What Does Success Look Like?

- Ideas to better engage our institution stakeholders on TTC?
- What best practices have you experienced that could work with TTC?

# Our Ask of the Advisory Council

The Advisory Council's support and sponsorship is critical to the success of change management initiatives

- The TTC Team will provide the Advisory Council with stakeholder engagement plans and important, timely information to help support decision-making
  - ***Please, communicate to the institutional communities***
- The stakeholder engagement plan will outline recommendations to develop strong advocacy for the TTC project at all levels of the UW system
  - ***Let us know if you need guidance implementing plan components relevant for your area***



# Supporting the Conversation for Change

## Change Strategy Provides

- Why?** → Clear articulation of rationale for change.
- What?** → Definition of scope and stakeholder priorities
- When?** → Planning and visibility of timing and sequence.
- Who?** → Alignment of roles, talent, and bandwidth.
- How?** → Enablement with tools, training, and motivation

## Action Means

- Measuring success against the rationale.**
- Defining objectives and outputs; responding to input**
- Maintaining project discipline and commitments**
- Resourcing effectively and promoting accountability**
- Providing “hard” and “soft” support and recognition**



**Support of change through formal and informal reinforcement**

# Upcoming Advisory Council Resources



- Visit the TTC Website for detailed information and updates on the title and total compensation project and framework



- Advisory Committee members will be provided with an HR contact. Please use this to raise issues, questions, and ideas, to the TTC project team.



- Advisory Committee members will be provided with “elevator speech” talking points and a communication toolkit



- Additional information in the form of FAQ guides and one-pagers will be presented throughout the change management process

***Communicating this information across campus is especially important for the **Benefits Preferences Survey** – your help in communication will lead to greater participation!***

## Questions and Thank You

# Appendix

- Sample Outcome: Job Description (Before)
- Sample Outcome: Standard Job Description (After)

# Sample Outcome: Job Description (Before)

## Job Title: Accountant I

### Summary:

This key position in the Dept Budget Office performs accounting, auditing and reconciliation activities relating to the, preparation and maintenance of budget, accounting and financial control consultation with the Associate and Assistant Deans on fiscal projects including annual budget building, budget status reports and budget reconciliation. Responsibilities include maintaining the College's accounting systems as well as reconciliation activities involving General Purpose Revenue (GPR) funds in particular. The General Purpose Revenue (GPR) expenditures in 2011-2012 were in excess of \$182 million and 2011-2012 expenditures from all funds totaled over \$337.5 million.

The position maintains accounts and provides accounting information to a wide variety of stakeholders, including colleagues in the Budget Office as well as key contacts within Administration and across the wide variety of units in the College. Initiates budget transfers across the college and coordinates fund transfers from campus to L&S as well as with other schools/colleges and campus partners as necessary. Interprets and analyzes accounting data and serves as a key resource on financial matters.

This position functions independently in performing these duties and responsibilities. The person in this position must have an outgoing/energetic service-oriented approach to facilitate and foster interaction and communication, including with O position requires a strong attention to detail, excellent customer service skills, good presentation and effectively with a wide variety of constituents.

### Responsibilities:

- A. 45% Maintenance and reconciliation of the College GPR budget
1. Maintain accounting system to effectively monitor and control the College operating budget. Ac Report operating results and communicate with Associate and Assistant Deans regularly.
  2. Maintain historical financial management information for use in decision making. Analyze financ
  3. Maintain the College annual Red Book budget, analyze department budget submissions for accu
  4. Manage incoming funds to the College. Initiate, perform and serve as the primary point person accounts.
  5. Initiate, develop and maintain an automated budget transfer system to process and track transfers, integrated with the UW-Madison budget system. Prepare monthly and quarterly transfer reports, counsel and advise the Associate Dean and Assistant Dean as well as department financial officers of variances.

- Inconsistent structure, length, and level of detail
- Difficult to comprehend quickly

- Varying number of listed responsibilities
- Includes either too much or too little detail
- Inconsistent grammatical structure



# Sample Outcome: Standard Job Description (After)

## Job Title: Accountant I

### Summary:

Performs general accounting and/or auditing duties and assists higher-level accountants with general accounting work to ensure the accurate recording and reporting of the business unit's financial transactions.

- Concise summary
- Clear purpose
- Drawn from responsibilities

### Responsibilities:

- Performs routine accounting duties by utilizing professional experience, competency in accounting principles and practices.
- Prepares financial reports by reviewing financial data and investigating accounting discrepancies.
- Establishes and maintains financial journals, accounts, ledgers and records within an automated financial system.
- Assists higher-level accountants by providing general support in various accounting functions such as: performing and reviewing reconciliations, journal entries, preparing working papers, schedules and reports.

- Focuses on 4 to 7 core responsibilities
- Consistent structure
- Active tense
- Bullets summarize similar tasks