Title and Total Compensation Study
Update to UWRF
September 2017
UW-River Falls TTCS Project Team

• Michelle Drost, HR Director
• Brenda Creighton, HR Manager
• Deb Schwab, HR Manager
• Mialisa Moline, Ph.D., Chair, Faculty Senate
• Kathleen Hunzer, Ph.D., Chair, Academic Staff Council
• Kathy Young, Chair, University Staff Senate
Executive Sponsors

- **Raymond Cross**, President, University of Wisconsin System
- **Rebecca Blank**, Chancellor, UW-Madison
- **Robert Cramer**, Vice President for Administration, University of Wisconsin System
- **Laurent Heller**, Vice Chancellor, Finance and Administration, UW-Madison

Advisory Council Co-Chairs

- **Mark Mone**, Chancellor, UW-Milwaukee
- **Sarah Mangelsdorf**, Provost, UW-Madison
## Advisory Council for Title/Total Compensation Study

<table>
<thead>
<tr>
<th></th>
<th>Title</th>
<th>Institution</th>
<th>Representative</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>One Chancellor</td>
<td>UW-Milwaukee</td>
<td>Chancellor Mark Mone, UW-Milwaukee</td>
</tr>
<tr>
<td>2.</td>
<td>One Provost</td>
<td>UW-Madison</td>
<td>Provost Sarah Mangelsdorf, UW-Madison</td>
</tr>
<tr>
<td>3.</td>
<td>Two Senior-Level Financial Executives (e.g., CBO, Business Services)</td>
<td>UW-Madison</td>
<td>Bethany Plumers, Associate Dean for Administration, UW-Madison Law School</td>
</tr>
<tr>
<td>4.</td>
<td></td>
<td>UW Colleges/Extension CBO</td>
<td>Steve Wildeck, Vice Chancellor for Administration and Finance, CBO, UW Colleges/Extension</td>
</tr>
<tr>
<td>5.</td>
<td>Two Faculty</td>
<td>UW-Madison Chair of the University Committee or designee</td>
<td>Susan E. Babcock, Professor, UW-Madison College of Engineering</td>
</tr>
<tr>
<td>6.</td>
<td></td>
<td>UW System Faculty Representatives Council Chair</td>
<td>Holly Hassel, Professor, UW Colleges</td>
</tr>
<tr>
<td>7.</td>
<td>Two Academic Staff</td>
<td>UW-Madison Chair of Academic Staff Executive Committee or designee</td>
<td>Heather McFadden, Director, RCR Education, UW-Madison</td>
</tr>
<tr>
<td>8.</td>
<td></td>
<td>UW System Academic Staff Representatives Council Chair</td>
<td>Jenny Resch, Director Outreach &amp; Student Affairs, UW-Stevens Point</td>
</tr>
<tr>
<td>9.</td>
<td>Two University Staff</td>
<td>UW-Madison Chair of University Staff Executive Committee or designee</td>
<td>Terry Fritter, ART Advanced, UW-Madison</td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td>UW System University Staff Representatives Council Chair</td>
<td>Denise Ehren, Program Associate, UW-Whitewater</td>
</tr>
<tr>
<td>11.</td>
<td>Two Limited Appointees</td>
<td>UW-Madison Chancellor Appointee</td>
<td>John Krogman, COO, Division of I.T., UW-Madison</td>
</tr>
<tr>
<td>12.</td>
<td></td>
<td>UW System President Appointee</td>
<td>Tammy McGuckin, Dean of Students, UW-Parkside</td>
</tr>
</tbody>
</table>
Advisory Council Charge

Advise on vision and mission for the project
Act as a representative of, and liaison to, stakeholder groups
Advocate for the project with all stakeholders
Endorse the business case for the project
Advocate for resources
Advise on the development of the Request for Proposal (RFP)
Participate in meetings of the Advisory Council
Review status and provide advice to help the study progress
Advise and support the study project team
Mercer

Karen Hutcheson  
Partner  
- Engagement Leader  
- Leads Mercer’s compensation and talent consulting services to higher education clients

Ken Simek  
Partner  
- Project Advisor  
- Leader of Mercer’s Higher Education Industry Vertical

Paola Guyer  
Principal  
- Project Manager for Communications and Change Management

Lyn Harper  
Principal  
- Co-Project Manager for Compensation and Classification  
- Day-to-day contact for UW-Madison

Regina Sherwood  
Principal  
- Co-Project Manager for Compensation and Classification  
- Day-to-day contact for UW-System

Celeste Dickson  
Senior Associate  
- Project Consultant for Communications and Change Management

Elizabeth Walgram  
Senior Associate  
- Project Consultant for Compensation and Classification  
- Dedicated resource for UW-Madison

Nicole Cook  
Senior Associate  
- Project Consultant for Compensation and Classification  
- Dedicated resource for UW-System

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## Current vs. Future State

<table>
<thead>
<tr>
<th>Current State</th>
<th>Future State</th>
</tr>
</thead>
<tbody>
<tr>
<td>Titles and functional groupings are outdated.</td>
<td>Titles and functional groupings reflect work performed today.</td>
</tr>
<tr>
<td>Over 1,800 job titles exist. Some job titles have many incumbents performing very different work.</td>
<td>Job titles provide a basis for grouping positions performing similar work.</td>
</tr>
<tr>
<td>Career frameworks are different across employee categories including career paths and requirements for progression that are not always clear.</td>
<td>Clearly defined career framework (spanning across all staff categories) providing helpful guidance to employees and managers.</td>
</tr>
<tr>
<td>Salary structures not based on relevant or updated market data.</td>
<td>Market-informed salary structures in place for university staff, academic staff, and limited appointee positions which help to attract and retain the best and brightest talent.</td>
</tr>
</tbody>
</table>
### Major Components of the Study

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
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<tbody>
<tr>
<td>Define and confirm compensation philosophy</td>
<td>Assess positions and develop new job title structure</td>
</tr>
<tr>
<td>Develop New Compensation Structure</td>
<td>Market analysis of compensation, benefits and work-life offerings</td>
</tr>
<tr>
<td>Development and Follow-up Reviews</td>
<td>Develop Career Lattices</td>
</tr>
<tr>
<td>Implementation and Follow-up Reviews</td>
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</tbody>
</table>
Study Guiding Principles

• The purpose of the TTC Study is on the alignment of job titles.

• The TTC Study will enable us to have a more accurate picture of how jobs and job titles align with the market and support planning. Market deficiencies will be reviewed and addressed over time.

• The focus of the study is on positions, not the individuals in these positions. The study does not involve an equity analysis.
PROJECT PLAN OVERVIEW AND TIMELINE

Major Components of the Project Plan

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
   - Create/update job descriptions
   - Job titling framework
   - Map positions to the titling framework
   - Review FLSA classifications
   - Stakeholder briefings

III. Create Compensation Structure
   - Analysis of compensation
   - Salary structure
   - Preliminary impact analysis
   - Salary administration guidelines
   - Stakeholder briefings

IV. Review Benefits Structures
   - Analysis of benefits structures and levels
   - Gap analysis and recommend solutions

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

Projected timeline 24 months – February 2019

Phase 2
Job Titling Framework

Nearing Completion of Phase I

Communication, change management and stakeholder engagement
Phase I – Design and 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
Phase I – Design and Study

Stakeholder interviews

- First step in the development of Total Compensation Philosophy
- Interviews with key stakeholders across the UW System to understand perspectives on current and future state
- Interviews began in May and ended in early June
- Group and individual interviews were facilitated by Mercer using standard set of questions
Phase I – Design and Study

Summarized Findings

- Key themes surfaced from the interview process
- Nine (9) preliminary guiding principles for the UW total compensation program were developed based on these interview themes
- Preliminary guiding principles are key to the development of Total Compensation Philosophy
- Mercer will also incorporate inputs from other project phases
APPENDIX B
INTERVIEW PARTICIPANTS

• UW System Stakeholders
  • March 21st
    - Advisory Council
  • April 12th and 13th
    - Human Resources Directors
  • April 20th
    - President
    - Chief Business Officers
  • May 5th
    - Joint Governance
  • June 2nd
    - Chancellors
  • June 7th
    - Provost Council

• UW-Madison Stakeholders
  • April 12th
    - Academic Staff Executive Committee
    - Associate Vice Chancellor Academic Staff (Enrollment Division)
    - Athletics
    - University Staff Central Committee
    - VCFA Directors
    - Dean, School of Nursing
    - Dean, School of Letters and Science
  • April 13th
    - Human Resources Directors
    - Administrative Council
    - Provost
    - Vice Chancellor Finance and Administration
    - Chancellor
    - Vice Chancellor for University Relations
    - Director, Academic Planning and Institutional Research
    - School of Medicine and Public Health
    - Vice Provost of Faculty and Staff Programs
    - Vice Provost and Chief Diversity Officer
Phase I – Design and Study

Preliminary Total Compensation Philosophy Guiding Principles

- Adopt a total compensation philosophy and program that aligns with the UW’s mission and culture, supports the attraction and retention of talent and has the flexibility to accommodate the needs of each institution.

- Reference regional and/or national compensation benchmarks that reflect the specific market(s) in which each of the UW institutions compete for talent.

- Provide clear and transparent communication about compensation, benefits, career opportunities and performance management at the UW.
Phase I – Design and Study
Preliminary Total Compensation Philosophy Guiding Principles

- Reinforce that performance is a factor in determining pay
- Develop contemporary and market-informed total compensation structure that considers the external and the UW’s market for jobs and is responsive to changing market conditions
- Clarify career development opportunities with a well-defined job framework, consistent and modernized titles and up to date job documentation
Phase I – Design and Study

Preliminary Total Compensation Philosophy Guiding Principles

- **Prepare leaders** to manage titles, and compensation effectively and fairly through a program that balances structure with flexibility and provides ongoing training, tools and support

- **Follow a robust process** which includes periodic review of the total compensation philosophy, administrative guidelines and policies

- **Design a program that complies with federal and state laws, is fiscally responsible, and sustainable over time**
Phase II – Assess Positions and Develop New Job Structure
II. Assess Positions and Develop New Job Title Structure

- Create/update job descriptions
- Job titling framework
- Map positions to the titling framework
- Review FLSA classifications
- Stakeholder briefings
Phase II – Job Framework

BUILDING BLOCKS OF A JOB FRAMEWORK

“Job Framework” describes a process for organizing jobs based on similar nature of work.

Best practice is to develop and implement a common job framework that can be used across the organization by all institutions.

For employees, a framework for organizing jobs for pay and classification purposes. It can be a foundation for understanding future career progressions.

For HR, it facilitates benchmarking, job classification, and workforce planning and analysis.

BENEFITS OF COMMON JOB FRAMEWORK

For managers, it makes it easier to communicate how jobs are assigned to pay structures based on responsibilities and requirements.

For institutions and the System, it provides overarching structure and guiding principles for organizing jobs more consistently.

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Phase II – Job Framework

- Job Framework Components
  - Career Paths
    - Organizational contributor
    - Manager
  - Job Families and Sub-families
  - Levels
  - Level Descriptors
CAREER PATH

- Career stream, or career path, is defined as a career type within the organization characterized by unique responsibilities and requirements.
  - Career streams help define the job framework at the most basic level.

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**Illustrative**

<table>
<thead>
<tr>
<th>ORGANIZATIONAL CONTRIBUTOR</th>
<th>MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>- May provide administrative and/or technical support for UW activities, processes and projects.</td>
<td>- Has budget responsibility for the unit and/or</td>
</tr>
<tr>
<td>- Responsible for delivering and executing the activities and deliverables required to meet the strategic objectives of the organization.</td>
<td>- Accountable for people and performance management of the team, and/or</td>
</tr>
<tr>
<td>- May demonstrate technical depth in one or more disciplines and viewed as technical SMEs.</td>
<td>- Responsible for the strategic and/or operational direction of a unit or program</td>
</tr>
</tbody>
</table>

*Note: The UW definitions for organizational contributor and manager career paths are still under development.*
Phase II – Job Framework

JOB FRAMEWORK
JOB FAMILY STRUCTURE

- **Job Families** refer to a group of jobs performing broadly similar work. Examples of job families include Finance, Human Resources, Information Technology, Facilities, and Capital Planning, and Advancement.

- **Sub-families** are more specific sub-sets within job families. Examples include Custodial and General Labor (within Facilities and Capital Planning), and Alumni Relations (within Advancement).

**Guidelines for defining job families**

- Distinguish functions and job families from organization design and the nature of work from reporting relationships.
- Ensure that job families and sub-families are meaningful both internally and externally.
- Provide a foundation for progression within the job family.
  - Broader buckets ensure administrative ease, facilitates program update and maintenance, and flexibility to support employee progression.
  - Avoid very specific sub-families to minimize the number of jobs "straddling" sub-families.
Phase II – Job Framework

JOB FRAMEWORK
UW JOB FAMILIES AS OF JULY 1 (DRAFT)

- Academic Services
- Administration
- Advancement
- Animal Care
- Arts
- Athletics/Recreational Sports
- Clinical Faculty
- Communications/Marketing
- Compliance, Legal, and Protection
- Educational Services
- Executive Leadership
- Facilities & Capital Planning
- Financial
- Health Services
- Human Resources
- Information Technology
- Instruction and Related Services
- Library and Museums
- Operations, Sales, and Hospitality
- Research and Diagnostics
- Research Administration
- Student Services

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Phase II – Job Framework

**Job Framework**

**Job Family Descriptions**

- Job Families organize jobs by the nature of the work and core accountabilities. Sub-Families are sub-sets within a job family and used to further organize jobs.

<table>
<thead>
<tr>
<th>Job Family</th>
<th>Description</th>
<th>Sub-Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement</td>
<td>Supports the advancement of the institution’s mission through cultivating the support of donors both directly through solicitations and fundraising campaigns and indirectly through building and nurturing strong relationships with alumni, the business community, foundations, public, etc.</td>
<td>Alumni Relations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Corporate/Foundation Relations</td>
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<tr>
<td></td>
<td></td>
<td>Development</td>
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<tr>
<td>Facilities &amp; Capital Planning</td>
<td>Provides services related to operation, maintenance, and renovation of all the institution’s property, including student housing facilities, buildings, facilities, and equipment. Provide oversight and management of environmental health and safety programs that protect the environment, provide safe and health conditions at the institution, and comply with laws and regulations.</td>
<td>Agricultural and Land Operations</td>
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<td></td>
<td></td>
<td>Architecture/ Design</td>
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<tr>
<td></td>
<td></td>
<td>Construction</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Custodial and General Labor Services</td>
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<td></td>
<td></td>
<td>Engineering</td>
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<td></td>
<td></td>
<td>Inspection &amp; Maintenance</td>
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<td></td>
<td></td>
<td>Operations</td>
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<td></td>
<td></td>
<td>Generalist</td>
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<td>Planning</td>
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<td></td>
<td></td>
<td>Mail Services</td>
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<td></td>
<td></td>
<td>Parking and Transportation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Skilled Trades</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sustainability</td>
</tr>
</tbody>
</table>

*Illustrative*
Phase II – Job Framework

**Job Framework Career Levels**

- Career level represents the tiered position of a job within a career stream. The definitions for each of the job levels is consistent across job families.
  - This part of the Job Framework is focused on defining organizational contribution.

- The career levels reflect the typical levels in the market and in published salary surveys, but may be customized. Linking the levels to market will enable UW to update and maintain the program in the future.

<table>
<thead>
<tr>
<th>Organizational Contributor</th>
<th>Manager</th>
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<tbody>
<tr>
<td>OC7</td>
<td>M6</td>
</tr>
<tr>
<td>OC6</td>
<td>M5</td>
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<tr>
<td>OC5</td>
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<td>OC3</td>
<td>M2</td>
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<td>OC2</td>
<td>M1</td>
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<td>OC1</td>
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LEVEL DESCRIPTORS

Work dimensions (also called “Job Level Descriptors”) describe the characteristics of each job level and articulate the increasing responsibilities and requirements of jobs. This serves as a tool to evaluate jobs, to assign them to levels, as well as to create the foundation for career progression.

<table>
<thead>
<tr>
<th>Work Dimension</th>
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</thead>
<tbody>
<tr>
<td>Organizational Impact &amp; Complexity</td>
</tr>
<tr>
<td>Nature and scope of influence, the level has on its realm of responsibility. Degree to which the level needs to identify and devise solutions to problems</td>
</tr>
<tr>
<td>Leadership &amp; Talent Management (for Manager)</td>
</tr>
<tr>
<td>Responsibility for people development, including supervision, training, coaching, and performance management</td>
</tr>
<tr>
<td>Independence/Supervision (for Organizational Contributor)</td>
</tr>
<tr>
<td>Level of independence in performing work and autonomy to make decisions</td>
</tr>
<tr>
<td>Knowledge &amp; Experience</td>
</tr>
<tr>
<td>Level of expertise required to fulfill responsibilities as defined by minimum levels of formal education and/or work experience</td>
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