TITLE AND TOTAL COMPENSATION PROJECT

SYSTEMWIDE JOINT GOVERNANCE UPDATE

JANUARY 31, 2020
Today’s Agenda

1. Quick History & Project Progress
2. Recap from Last Meeting
3. Revisit of New Concepts
4. Instructional Academic Staff Feedback
5. Benefits Surveys Review & Results
Quick History

2011

**Wisconsin Act 32**: Provided UW System and UW-Madison with an opportunity to create their own “separate and distinct” personnel systems

2015

**University Personnel Systems (UPS/HR Design)**: Effort to build more efficient and effective UW human resources systems

2017

**Title and Total Compensation Project**: First review of UW System’s (non-faculty) compensation and benefits in 30 years
Major Objectives

**TITLES & COMPENSATION**
- Market-informed

**PERFORMANCE**
- Alignment of Mission with employee work

**WORK LIFE BALANCE**
- Practices that help achieve employee success at work and home

**BENEFITS**
- Time off, wellness, and retirement programs

**RECOGNITION**
- Reinforcement of good performance

**DEVELOPMENT**
- Opportunities for professional and personal growth

**ATTRACT**

**ENGAGE**

**MOTIVATE**

**REtain**
Progress

2019
Title & SJD Review and QA

Job Mapping

2020
Employee-Manager Conversations & Feedback

Implementation
Quality Assurance Review

Online posting of draft job titles & employee feedback

Notification & title appeals, go-live
Recap From Last Meeting

Recap

Provided an overview of:
• the learning and engagement resources available on the project website
• the processes for the creation and mapping of standard job descriptions
• the title appeal policy and process

Progress

• Updated the UWS Title Appeal Policy language from CHRO to Chancellor and/or Chancellor’s Designee
• Relayed governance concerns about bias in mapping/appeals to CHROs;
• Confirmed need for collaboration with governance groups for Step 2 review for the UWS Title Appeal Policy
New Concepts

Pay Progression versus Promotion

Business Titles
**Pay Progression Versus Promotion**

**Today**
- Pay progression and promotion are interchangeably terms.
- You typically perform the **same work**, but your **title changes** and your **pay increases**.
- Minimum requirement is often years of service.

**After Spring 2020**
- **Pay increases** within the same job.
  - Based on **knowledge, skills, experience**, and **performance**.
  - Your **job title** and **core responsibilities** remain the **same**.
  - Reasons for pay increases continue to include factors such as pay plan, market changes, retention and parity.

**What progression/promotion might look like today**

**In the future, progression and promotion are defined separately**

**PAY PROGRESSION**
- Pay increases within the same job.

**PROMOTION**
- Advancement to a **new job** with a higher pay range.
  - Your **job title** and **responsibilities change**.
  - Starting pay takes market data and parity into consideration.
**Pay Progression Versus Promotion Examples**

**PAY PROGRESSION EXAMPLE**

- Randall is a Research Specialist
- After two years on the job in year three, Randall receives a pay increase for high performance
- In the seventh year, Randall receives another performance increase
- In year 10, Randall receives an increase to account for market changes in research specialist jobs
- Randall has the same job title, responsibilities, and is in the same position
- As Randall’s knowledge, skills and experience increase, Randall’s high performance is recognized through progression in his pay range

**PROMOTION EXAMPLE**

- Helen is an Academic Program Specialist and has been in the current position for several years, gaining knowledge and experience
- An Academic Program Manager position opens in the unit
- Helen applies and is selected for the position
- As a result of the promotion, Helen takes the lead to manage two academic programs, and her new responsibilities include managing program budget, implementing new standard operating procedures, and representing the programs on and off campus
- Helen’s new title is Academic Program Manager and moves into a higher pay range
What Is A Business Title

A working title that is locally controlled at the campus level and created due to a business need, which can be used in lieu of the title of record/official title within established guidelines.

A business title can:

- **Clarify** a position’s role in the organization
  
  For example, a Benefits Analyst can use a business title of TSA Administrator to let people know to go to them for information about TSA.

- **Describe** the work performed in a role
  
  For example, a Policy and Planning Analyst can use a business title of Senior Policy and Planning Analyst to let people know they are a lead and subject matter expert in this department.

- **Align** with industry best practice
  
  For example, an Administrator Director can use a business title of Wisconsin Intercollegiate Athletic Conference (WIAC) Commissioner to better describe his role to athletics colleagues.
There must be a demonstrated need for a business title based on the following guidelines:

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
Instructional Academic Staff Feedback

Non tenure-track Instructional Academic Staff provide instruction and training to students online or in a classroom, laboratory, and/or clinical setting

Official Titles/Titles of Record

- Lecturer
- Teaching Professor*
- Research Professor*
- Teaching Faculty I-IV: UW-Madison

Business Title Examples

- Senior Lecturer
- Distinguished Lecturer

*subject to institution-level discussion/decision

The assignment of prefix business titles to reflect status at the institution-level is delegated to the institution’s chancellor, if the modified titles comply with systemwide guidelines
Instructional Academic Staff Points for Discussion

- The **title of record** and **business title** have **equal weight** in HRS system and serve two different purposes; both together represent the work performed
  - Title of record – serves as a market comparison tool or broad classification
  - Business title – serves to add more specificity about the relation of the individual role within the institutional setting

- **Salary progression** will be more flexible
  - Opportunity for salary progression will not be limited to the number of titles that are available in a series

- Addition of new **Teaching Professor** title provides:
  - New potential roles for Instructional Academic Staff
  - Improved alignment of UWS title structure to market data
Benefits Surveys Review & Results
## Benefits Surveys & Strategy

<table>
<thead>
<tr>
<th>Benefits Value Analysis (BVA)</th>
<th>Benefits Preferences Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compared UW benefits against the market*</td>
<td>Identified what benefit options UW employees’ value</td>
</tr>
</tbody>
</table>

*“Market” includes public and private higher education peer institutions as well as private sector employers

### Long-Term Benefits Strategy

- Mercer provided comprehensive analysis of both
- UW reviewed and developed options
- Options and recommendations vetted with UW Stakeholders
- Recommendations presented to leadership
Peers

**UNIVERSITY PEER GROUPS**

**Peer Group 1: Large Public Universities** (e.g. Big 10, AAU, UCLA, Berkley, Texas, Washington)

**Peer Group 2: Public and Private Universities** (e.g. AAU, Marquette, NC, SUNY, Cleveland)

**Peer Group 3: Large Private Universities** (e.g. Boston, Cornell, Duke, Harvard)

**WISCONSIN PEER GROUPS**

**Peer Group 1: Large Private Corporations and Public Municipalities** (e.g. City of Madison, CUNA Mutual, Kohler, Madison Metro School District, TDS Telecom)

**Peer Group 2: Milwaukee Based Organizations** (e.g. Kohls, Lands’ End, Northwestern Mutual)

Benefits are valued using a sample, composite workforce made up of representative organizations that vary by industry, size, and geography.
### Key Findings: Benefits Value Analysis

#### UNIVERSITY PEER GROUPS

- UW leads across university comparators by an average of 2% to 4% above the median of the group:
  - Retirement/Savings: competitive to unfavorable, 3-16% below median
  - Health/Group: competitive to favorable, at to 20% above median
  - Time Loss: competitive, 5% below median

#### WISCONSIN PEER GROUPS

- UW leads across Wisconsin comparators by an average of 5% to 29% above the median of the group:
  - Retirement/Savings: competitive to 1% above median
  - Health/Group: favorable, 9-62% above median
  - Time Loss: competitive, 4-18% above median

University of Wisconsin System provides competitive benefit offerings across both University and Wisconsin Peer Groups
Employee Benefits Preferences Survey

Who took the survey?

18,634 employees completed survey

DEMOGRAPHICS
By median annual pay, tenure, age, gender

47% participation
Pay is ranked as the single most important element, followed by healthcare, stable employment and retirement savings plans, all of which are of ‘above average’ importance.
Employee Life Cycle

Most Important Benefits To UW System Employees

- **At Hire**
  - Type of work
  - Healthcare benefits
  - Retirement
  - Leave

- **While Employed**
  - Pay
  - Healthcare benefits
  - Leave
  - Retirement

- **Age 35 & Under**
  - Healthcare benefits
  - Leave
  - Type of work
  - Flexible schedules

- **Age 36 & Older**
  - Retirement
  - Healthcare benefits
  - Leave
  - Type of work
Which Benefits Are Under Consideration

<table>
<thead>
<tr>
<th>Preferential consideration given to these items</th>
<th>These items are not under consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potential Supplemental Benefits:</td>
<td>Foundational Benefits:</td>
</tr>
<tr>
<td>• Additional Paid time Off</td>
<td>• Wisconsin Retirement System</td>
</tr>
<tr>
<td>• Flexible Work Arrangements</td>
<td>• Health Insurance</td>
</tr>
<tr>
<td>• Supplemental Health Benefits</td>
<td>• Dental Insurance</td>
</tr>
<tr>
<td>• Other non-statutory additions/enhancements</td>
<td>• Vision Insurance</td>
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<tr>
<td></td>
<td>• FSA/HSA</td>
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<tr>
<td></td>
<td>• State Group Life Insurance</td>
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Opportunities To Do Better

Majority of respondents say benefits packages meets their needs and is a factor in retention

Approximately half of respondents are unfavorable regarding pay

Relatively small numbers of respondents foresee the need to rely on credit cards to pay bills over the next six months. However, slightly more than a third of respondents describing their financial situation as ‘stressful’.

While most feel they could manage an unforeseen expense of $400, one third do not believe they are doing enough to prepare for retirement
Additional Opportunities To Improve

Based on survey responses, UW System is beginning to identify areas that present opportunities for possible enhancements

- Advancement Opportunities
- Parking Access & Costs (UW-Madison)
- Paid Parental Leave
- Paid Time Off/Time Loss

<table>
<thead>
<tr>
<th>Very Important</th>
<th>Important</th>
<th>Extra perks</th>
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<tbody>
<tr>
<td>o Leave standardization</td>
<td>o Tuition assistance</td>
<td>o Gym/fitness</td>
</tr>
<tr>
<td>o Paid parental leave</td>
<td>o Employee</td>
<td>o Discount programs</td>
</tr>
<tr>
<td>o Income protection</td>
<td>o Dependents</td>
<td>o Meal subsidies</td>
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<tr>
<td>o Parking subsidy (UW-Madison)</td>
<td>o Holistic wellness</td>
<td>o Voluntary benefits/pet insurance</td>
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<tr>
<td>o Flexible work schedules</td>
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For More Information

wisc.edu/ohrwd/title-and-total-compensation-study/
hr.wisc.edu/title-and-total-compensation-study/

 TTC@UWSA.EDU
TTCS@udy@OHr.WISC.EDU