Title & Total Compensation Project

HR Training Part 2

UNIVERSITY OF WISCONSIN SYSTEM

Facilitator GUIDE

November 2019

Training Contents **Page**

This icon lets you know to reference your **Participant Packet** at key points during the training and practice exercises.

Training Overview

Description:

TTC HR Training is a two-part series. Part 1 occurs during summer of 2019, Part 2 occurs during fall of 2019.

HR Training Part 2 topics include:

- Introduction/Overview
- Employee-Manager Conversation
- Title Appeals
- Changes to Current Policies
- What's Next

Target Audience:

Training is designed for human resources professionals who will be involved in:

- Advising managers and employees on the Title and Total Compensation changes
- Verifying employee mapping to new titles/standard job descriptions
- Facilitating employee-manager conversations about employees' new titles/standard job descriptions

Learning Objectives:

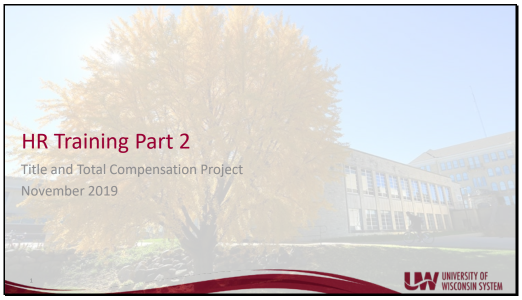
At the end of the session today, you will be able to:

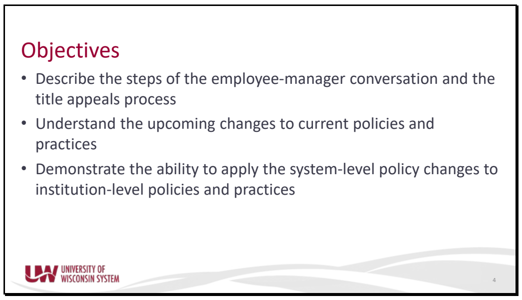
- Describe the steps of the employee-manager conversation and the title appeals process
- Understand the upcoming changes to current policies and practices
- Demonstrate the ability to apply the system-level policy changes to institution-level policies and practices

Materials/Supplies (in SharePoint folder):

- Facilitator Guide
- Participant Packet
- PowerPoint Slides

Welcome (Slides 1 – 3) 10 min.





The Title and Total Compensation Project is a big endeavor. We fully expect that you will have additional questions during and after this session. Our goal is that this training would provide you with foundational knowledge, especially for the employee-manager conversations coming up December through March.

We will cover:

- Introduction/Overview
- Employee-Manager Conversation
- Title Appeals

Use these slides to train HR Staff and Managers

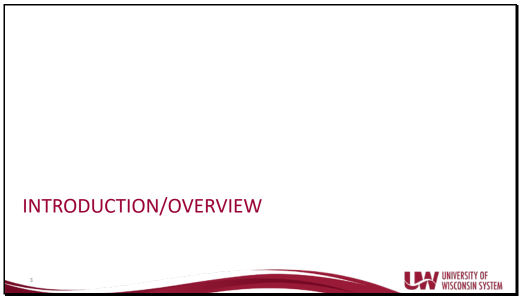
- Changes to Current Policies
- What's Next

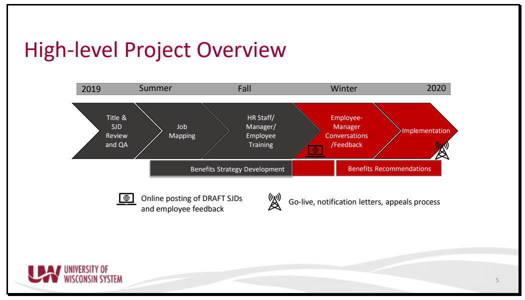
Use these slides to train HR Staff

The objectives of this training include the ability for you to,

- Describe the steps of the employee-manager conversation and the title appeals process
- Understand the upcoming changes to current policies and practices
- Demonstrate the ability to apply the system-level policy changes to institution-level policies and practices

Title and Total Compensation Project Overview (Slides 4 – 7) 15 min.



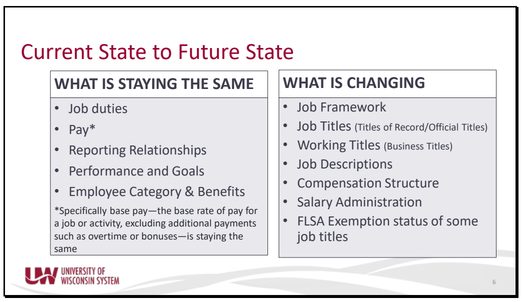


The UW System is committed to attract, retain, engage, and motivate a high quality and diverse workforce. In order to achieve that, we have to look at several areas: What attracts people to work at UW System, what keeps them here, and what keeps them engaged and motivated are all the factors to consider.

We are working through the job mapping process where employees are matched to an updated job title and standard job description. The title and total compensation project team, composed of compensation and titling specialists from UW-Madison and UW System Administration, proposed the first employee matches based on current position descriptions and the new standard job descriptions. → Institution Human Resources teams have been working with that initial mapping to further match employees to descriptions, in consultation with division and departmental leads. → The next step is for UW System to consolidate all the workbook data and review the matches for consistency among institutions and UW-Madison Divisions. → Then institution Human Resources units will send the quality-reviewed proposed matches to supervisors and managers to prepare for employee-manager conversations.

Concurrently, there is a systemwide effort to engage and train managers and human resources personnel through virtual town halls, eLearning, explainer videos, and a manager training toolkit. These materials can be found on the [UW System project website](). Human Resources personnel can access these materials through the Title and Total Compensation CHRO/HR Director SharePoint site in the [Training Resources]() folder. Continue to use the materials from the SharePoint site, especially the monthly Know-Share-Do from the Communications Monthly Toolkits folders to ensure consistent messaging is delivered at your institution.

Please verify that materials from the prior month are still current because the project team continues to update communication materials in response to feedback and new information often. You can always reach out to the project team prior to presentations, forums, and communications to make sure the information is the most current.



First, let’s discuss a potential change in the project implementation. Leadership is currently discussing extending the timeline for implementation a few weeks towards the end of March or April of 2020 in response to emerging feedback from institutions who believe a few more weeks could improve the quality of job mapping and the job titling structure. We are adapting to this change with the message that implementation will be in Spring 2020, instead of March 1, 2020.

To review what is not changing:

- Employees’ job duties will not change.
- Employees’ pay[1] will not change.
- Reporting relationships will remain the same as well.
- Performance expectations and goals. Since the work you are doing will not change because of the project, your performance expectations should remain the same as well.

[1] Specifically, base pay—the base rate of pay for a job or activity, excluding additional payments such as overtime or bonuses—is staying the same.

- Employee Category and Benefits.[2] The job codes are being written to allow current employee category (e.g., Academic Staff and University Staff) benefits to continue.

Now let's look at what is changing in Spring of 2020.

Although job duties are not changing, official job titles[3] and the way job titles are aligned will be different. In fact, all current job titles will be changing because we will have a new Job Framework. This Job Framework organizes all the titles into Job Families and Sub-Families.

Another change for employees is working titles. Currently, we use working titles because our official job titles are often not very meaningful. We expect job titles to be more reflective of the work performed in the future state, but there will be cases where new official job titles may not completely serve business needs. In those cases, employees can request a business title. We will talk about business title specifics later in this training.

How work is described is changing. The format of position descriptions will be updated to focus on responsibilities. Job descriptions will be clear and concise instead of detailed and lengthy. They will be a standard job description that will match to the labor market. Employees doing the same work will use the same standard job description.

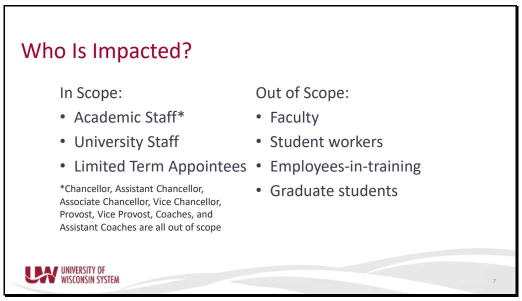
While employee pay will not change, the compensation structure will be different. The compensation structure is still a work in progress. We need to finalize the Job Framework before we can determine pay ranges for each job. The compensation structure will be shared publicly in Spring 2020.

This is a key message: individual pay will not be discussed until Spring 2020 because the Job Framework must be finalized first. Once that framework is in place, the compensation structure can be finalized.

[2] This includes health, dental and vision insurance as well as FSA/HAS, state group life insurance and the Wisconsin Retirement System.
[3] also called the "title of record."

How salary is administered, such as pay adjustments and starting pay of new hires, will also shift in the future. We will discuss Salary Administration Guidelines that provide guidance on how to operationalize the new compensation structure, and how employees can move within that structure.

The FLSA status of a few jobs may change. We anticipate that this will impact a small number of staff. We will be reaching out to institution Human Resources units to craft communications with impacted staff.



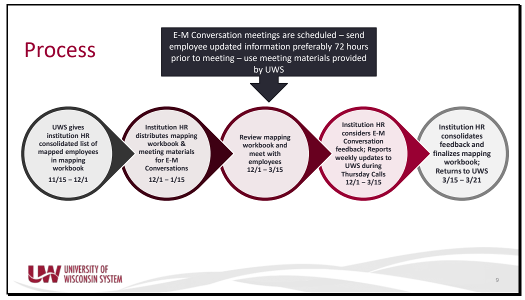
Let's define whose jobs will be impacted by the new Job Framework.

- Academic Staff[4]
- University Staff
- Limited Term Appointees

NOTE: Temporary Staff Employees will be impacted if their job title is also a job title in one of the in-scope employee categories. The list of jobs not impacted by this project will be linked on the standard job description library webpage when it goes live November 11th.

[4] A full list of out of scope titles will be linked on the SJD Library webpage.

Employee-Manager Conversations (Slides 8 – 16) 45 min.



Employee-manager conversations are how your institution chooses to engage employees in conversation about their updated job title and standard job description prior to Spring 2020. Let's break down each step in the process to get a better understanding of how employees will arrive at their new job titles.

NOTE: The project team is continually adding more titles/standard job descriptions as we are identifying gaps.

Through this process of mapping and verification at the institution-level → division-level → department-level→ unit-level → manager-level→ employee-level, the mapping is increasingly more accurate. We have essentially performed quality assurance checks at least four times before official title change notifications will be sent out in Spring 2020.

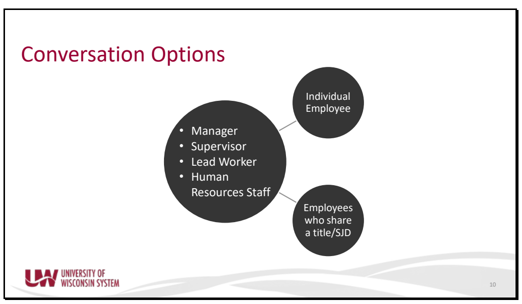
NOTE to Human Resources Directors: when verifying employee matches, remember to consult your institution's Chief Business Officers (CBOs), Chancellors, and VPs in the job mapping process.

The process of the employee-manager conversations will be:

- UW System gives institution Human Resources units a consolidated list of mapped employees in mapping workbook (targeting 11/15 – 12/1).

- Institution Human Resources units begin distributing mapping workbook & meeting materials for Employee-Manager Conversations (targeting 12/1 – 1/15[5]).
- Human Resources coordinates the manager-level mapping workbook review and Employee-Manager Conversations (targeting 12/1-3/15).
- Institution Human Resources units consider Employee-Manager Conversation feedback; reports weekly updates to UW System during Thursday calls (targeting 12/1-3/15).
- Institution Human Resources units consolidate meeting feedback and finalizes mapping workbook; returns completed workbook to UW System (targeting 3/15-3/21).

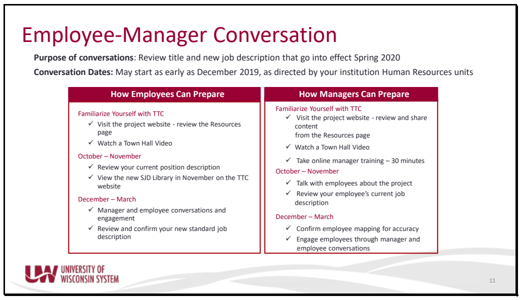
NOTE: Systemwide Joint Governance representatives has asked for employees to be able to review their updated job description information 72 hours prior to their scheduled meeting.

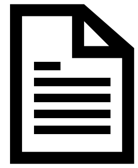


There are several options for how the employee-manager conversation can happen.

Managers, supervisor, lead workers, and HR professionals—one of these options or a combination can have the employee-manager conversations.

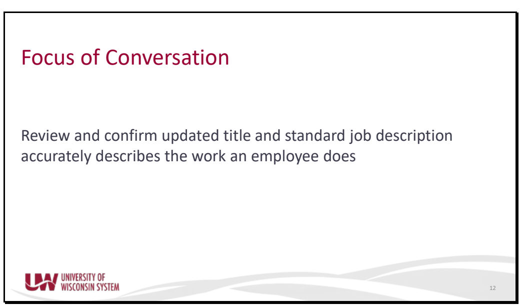
[5] Some institutions are starting conversations after the holiday break.

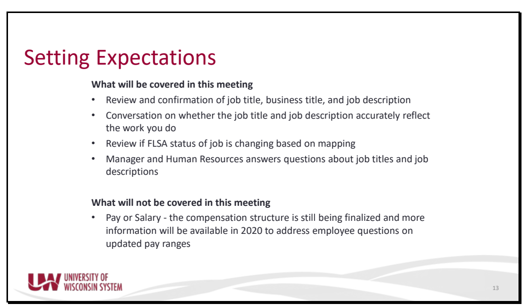




Here is a view of how employees and managers can prepare for the upcoming employee-manager conversation meetings.

- The standard job description library will be posted online November 11th.
- Anytime between December 1 and March 15 employees can sit down with managers and discuss their updated job title and job descriptions, as directed by institution Human Resources units.
- Managers should get their employees' information in advance of when they are expected to schedule meetings with employees.
- Employees can prepare for this conversation by learning about the project and considering their core work and responsibilities.
- Systemwide Joint Governance has requested employees get 72 hours to review their updated job information prior to the meeting with their manager.

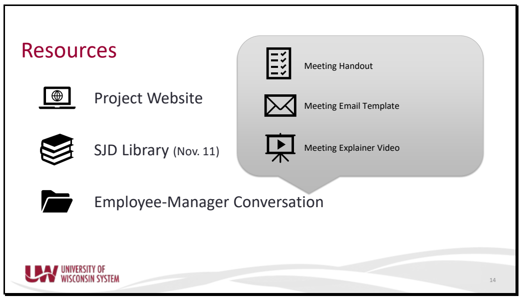




The focus of the conversation is whether the updated job title and job description accurately reflects the work you do.

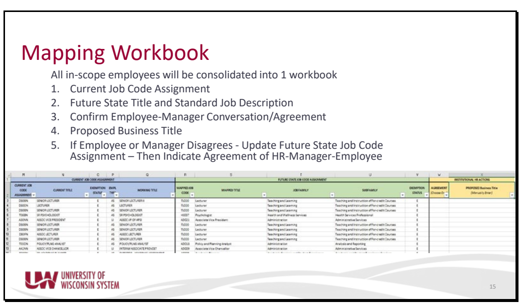
- Explain why NO discussion of individual pay or pay ranges during this conversation – because the compensation structure can only be finalized when the title structure is finalized.

- Pay range information will be shared in Spring 2020.
- This is an iterative, informal discussion to make sure the updated job title and job description are the best fit.
- Employees are expected to provide feedback and express concerns to their manager during this process.
- Explain your institution’s Title Appeals process. We will review the title appeals process in the second half of this training.



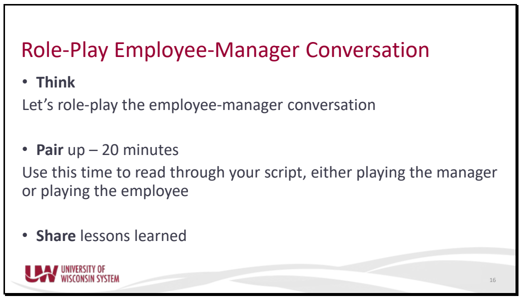
There are resources available for these conversations on the website and in development.

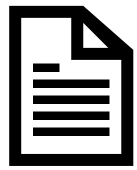
The employee-manager conversation materials will be available on the SharePoint site for distribution by institution Human Resources units prior to the start of employee-manager conversations.



Soon, institution Human Resources units will notify UW System when their workbook is completed except for those mapping matches contingent on a question in queue. UW System will consolidate the data and return the institution job mapping workbooks with new columns to mark the completion of employee-manager conversations and a requested business title.

If an official job title needs to be updated based on employee-manager conversations, make the changes directly in this version of the workbook to try and informally resolve as many titles as possible. Those left as "Nos" will indicate the number of expected title appeals post-implementation.





There are some soft-skills people need to make these conversations successful. Please see the Manager Training Toolkit on the SharePoint site for these supplemental resources.

Let's take 20 minutes to role play this conversation.

Pair up and look at your participant packet for background information and a script template. One person role-play the "manager" and one person role-play the "employee" in this scenario. You can read the script or use it as a guide and improvise.

We will regroup and share some reflections and lessons learned.

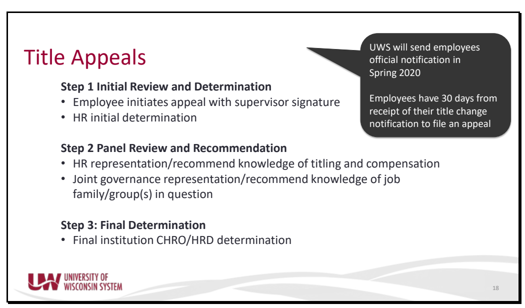
- "Employees" and "Managers," how did the conversations go? As expected?
- "Managers," how did you deal with the unexpected or unanticipated employee?
- "Employees," what was important to you during this conversation? Did you leave feeling satisfied or leave with questions?
- What are some key strategies or lessons learned we can take back to our institutions to help make these conversations a success?

Key Talking Points:

- Employees can do more than what is in the standard job description.

- Finding a standard job description is about finding a “best fit” meaning it covers about 80% of your current responsibilities.
- This is not the time for “promoting” yourself or your employees into a higher title; if the employee needs to update their PD (e.g. it is out of date or was never updated to reflect a temporary or permanent change in duties), continue to do so using current institution Human Resources business processes.
- UW System is currently softening the language of the standard job descriptions to allow for broader interpretation.
- The broad language allows for a more diverse applicant and candidate pool during recruitment.
- This is a fluid and dynamic process.
- The project provides guidelines, but allows flexibility for institutions to respond to emerging needs and stay current with the changing nature of work and job market.
- Most education is preferred and not required, because the job descriptions are use systemwide and therefore reflects only a minimum. Institutions can insert their specific criteria in recruitment materials. The job descriptions are meant to be a common foundation.
- The educational and licensing requirements and preferences are continually being refined based on feedback.

Title Appeals (Slides 17 – 22) 15 min.



UW System will send the official title change notification to all impacted employees in Spring 2020.

Employees will have 30 days from receipt of this notification to submit a title appeal with their institution Human Resources units.

Only title of record can be appealed[6], specifically whether the majority of the work an employee does falls within the scope of the title of record and standard job description.

Title appeals will occur at the institutional level where the Chief Human Resources Officer (CHRO) at each institution has the authority to resolve title appeals.

Proposed Standard of Review[7]:

- The employee filing the title appeal must supply the necessary documentation.
- Documentation must present clear and convincing evidence that a different title of record is a better fit for the work performed.[8]

Minimum Recommended Steps:

Step 1 Initial Review and Determination

When an employee (i.e. "appellant") believes their title of record does not accurately reflect a majority of the job's regularly assigned responsibilities, an employee may initiate a title appeal request by submitting a title appeal with the institution Human Resources unit.

After receipt of the appeal request, the institution Human Resources unit may review the appeal request and documentation and either: (1) make an initial recommendation, or (2) refer the title appeal to Step 2, or (3) reject the title appeal, if the information in the title appeal is insufficient to make a determination.

Step 2 Panel Review and Recommendation

If the appellant disagrees with the outcome of Step 1, or the institution Human Resources unit refers the title appeal directly to Step 2, then the institution

[6] Pay ranges are also not able to be appealed.
[7] The minimum requirements that must be met to undergo a fair review.
[8] Creation of a new title of record is not within the scope of a title appeal.

Human Resources unit may convene a panel to review the title appeal request. The panel may then provide a recommendation to the institution Human Resources unit.

Panel members may be selected by the institution Human Resources unit with membership composed of, but not limited to:

- a Human Resources representative with knowledge of titling and compensation;
- a Governance representative with knowledge of the job family/group(s) in question; and
- an employee from the appellant's unit, department, or division familiar with the kinds of work performed in that area.

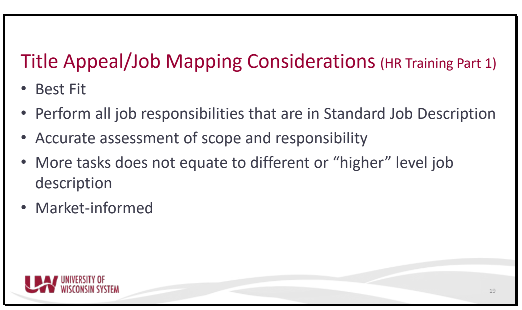
Any potential panel member unable to remain objective should opt out of the panel.

Step 3 Final Review and Determination
The CHRO may review the panel recommendation and make a final decision regarding the title appeal.

Institution Human Resources units should inform the appellant of the final decision.

Some institutions are developing a titling or personnel committee/panel for title appeals.

During the title appeal process for this project, the UW System project team will review all title appeals for any global trends and address any emerging issues.



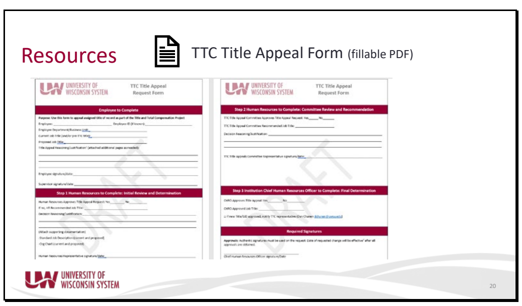
The standards used to create the initial standard job descriptions should still be used when considering title appeals.

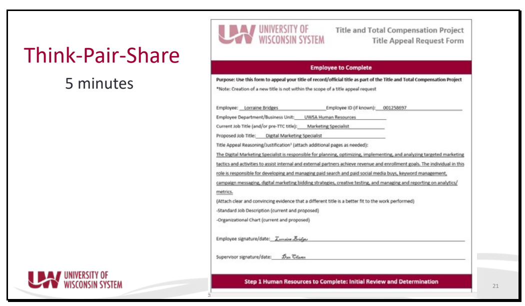
Factors to be considered include:

- Is this job description the best fit?
- Does the employee perform all job responsibilities?
- Does this title provide an accurate assessment of scope and responsibility of this work
- More tasks does not equate to different or "higher" level job description
- Is this title and description market-informed?

If employees end up creating a unique job, they are not helping themselves because it was not developed with creating a market match in mind.

If a job is not market informed, you are slotting, and if you are slotting it should be a business title.





There is a project-specific title appeal form available for institutions to use to process and track title appeals.

Let's take a look at a sample title appeal for a digital marketing specialist.

Take 5 minutes to think about this title appeal and pair up to discuss how you would assess this request and the steps at your institution to file, review, and process a title appeal.

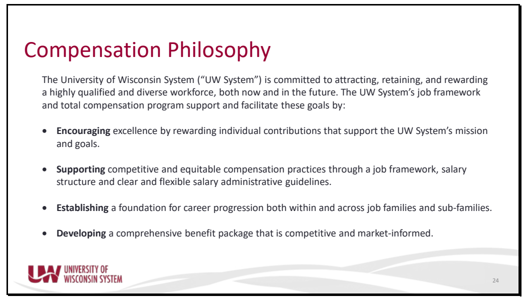
Does anyone want to share their discussion?

Take-aways:

- A supervisor signature is required.
- The employee must supply the documentation for the appeal.
- There is no digital marketing specialist title in the standard job description library and it is not within the scope of the appeals process for employees to create new titles to map themselves into.
- The responsibilities are actually covered in the marketing specialist standard job description and the work “digital” was just inserted to further specify the work.
- There is not enough information to see why the digital marketing specialist is different from the marketing specialist.
- Digital marketing specialist could be a good business title

Take 5-10 minutes to stretch and we will review changes to current policies when we return.

Changes to Current Policies (Slides 23 – 39) 60 min.



UW-System's Compensation Philosophy was created as part of the project. This is a statement of our vision and values when it comes to compensation for the University's workforce.

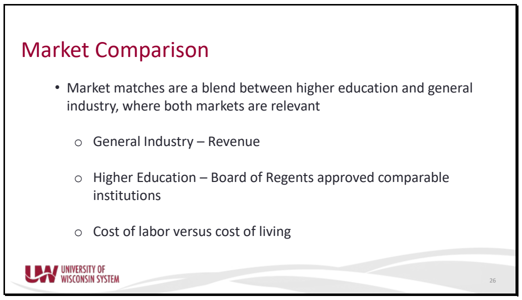
The UW System is committed to encourage excellence, reward contribution, support competitive and equitable compensation practices, establish a foundation of career progression, and develop a competitive, market-informed, and comprehensive benefit package [Compensation Philosophy Statement].

Pay and benefits are typically the first things people think about when they think about what attracts and retains employees.

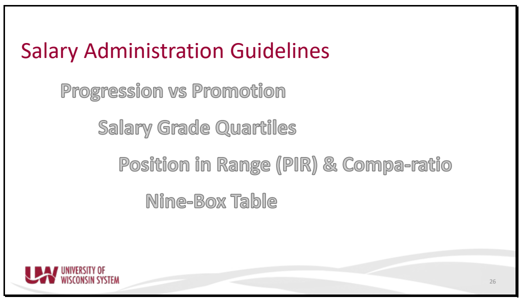
In fact, there are several other factors, like meaningful feedback on performance evaluations, recognition for a contribution to the organization, work-life balance, and opportunities to grow and develop. All of these interrelated factors attracted us to work here, keep us here, and keep us engaged in our work.

In the HR and compensation world, this idea that we attract, retain, engage, and motivate employees not just with a dollar amount, but through all these things is called Total Rewards. To realize the UW System Compensation Philosophy, the project aims to accomplish these items:

- Establish consistent job titles and compensation systemwide
- Align compensation and benefits with the market
- Develop guidance to address market issues over time
- Clarify long-term career potential within the Job Framework
- Sustain and grow an outstanding workforce



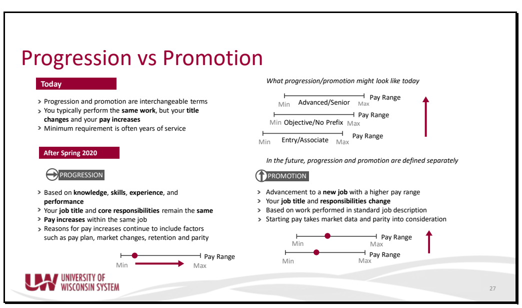
These are the elements that really impact market matching and determination of appropriate pay ranges.

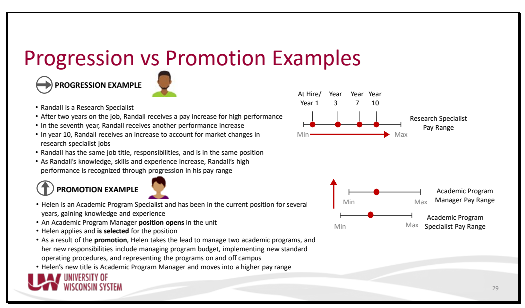


This part of the training will focus on managing salaries within the grade. We will discuss these tools and strategies to help determine how to pay employees equitably.

Salary administration guidelines are a flexible tool in the Human Resources toolkit.

QUESTION: How will you deal with employees currently in a title progression track at your institution?





Why are levels going away? They are going away because our current leveling system doesn't really reflect differences in the core work of a job, but rather time in seat, e.g. in 2 years employees will receive a raise.

KEY TALKING POINTS: Progression in an employee's pay range will no longer be restricted to the number of levels in a job title. In the future state, institutions will have the flexibility to review and administer pay increases based on the new Salary Administration Guidelines. UW System is now leveling jobs according to market data to broaden the pay ranges that will allow for greater movement within a range of pay. There will no longer be title sets or title prefixes intended for title progression in the titles of record. Each job has distinct responsibilities in the new structure.

The updated Salary Administration Guidelines will describe the ways employees can move through their pay range. Title of record will no longer be linked with pay increases.

This means institution Human Resource units will have to use more discretion move employees through their pay range at the institution, division, department, and unit levels.

Today, progression and promotion are interchangeable terms. Employees typically perform the same core work, but their title changes and pay increases. A minimum requirement is often years of service.

In the future state progression within pay range will be based on knowledge, skills, experience, and performance. Your job title and core responsibilities remain the same while pay increases within the same job. Reasons for pay increases continue to include factors such as pay plan, market changes, retention and parity.

In the future state promotion will be advancement to a new job with a higher pay range. Your job title and responsibilities change based on work performed in standard job description. Starting pay will take market data and parity into consideration.

Talk through the two examples:

PROGRESSION –

- Randall is a Research Specialist.
- After two years on the job in year 3, 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.

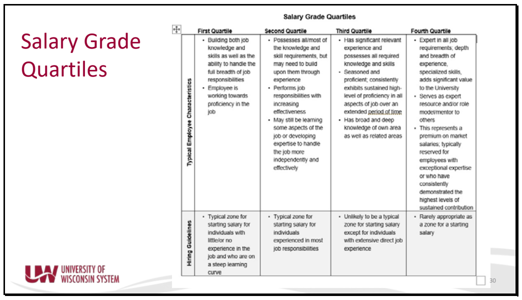
During this time, Randall has the same job title, responsibilities, and is in the same position. As Randall's knowledge, skills and experience increase, Randall's high performance is recognized through progression in his pay range.

PROMOTION –

- Helen is an Academic Program Specialist who has been in the current position for several years, gaining knowledge and experience in the position.
- An Academic Program Manager position opens up 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. Helen's new responsibilities include:
    - managing program budget,
    - implementing new standard operating procedures,
    - and representing the programs on and off campus.

Helen's new title is of Academic Program Manager and moves into a higher pay range.

More discussion about what this means for recruitment will happen during a Spring 2020 TTC HR Training Part 3.



This is the start of the conversation on the change in how we manage salaries within the grade.

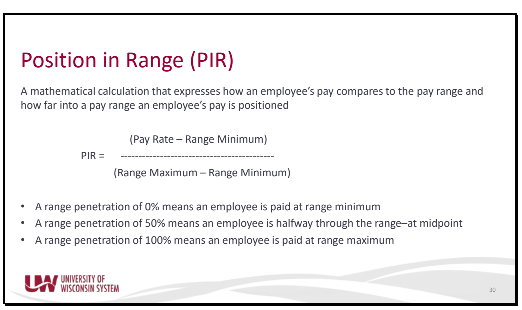
Salary grades reflect both internal and external considerations. The job framework organizes jobs into families/sub-families and career (OC/M) levels based on responsibilities within the university system, and the salary structure provides the alignment to the market.

Salary grades are wide enough to accommodate a variety of experience and performance levels, from novice to expert, while maintaining market-relevance.

An important principle of the program is managing salaries within the grade, which describes the appropriate placement of salaries in the grade, based on a number of factors, including the incumbent's knowledge, skills, experience, and performance.

Consistently following this guidance can help ensure that salaries are competitive as well as equitable.

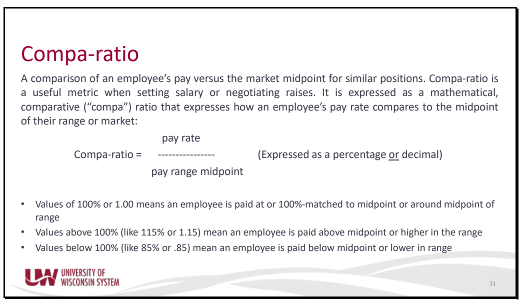
Compa-ratio and Position in Range (PIR) can be a useful calculation to manage the salary quartile guidelines.

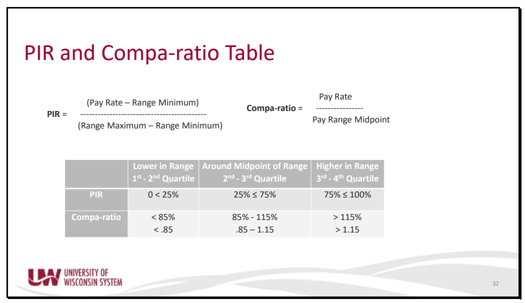


Position in Range (PIR) is a mathematical calculation that expresses how an employee’s pay compares to the pay range and how far into a pay range an employee’s pay stands.

$$\text{PIR} = \frac{\text{(Pay Rate – Range Minimum)}}{\text{(Range Maximum – Range Minimum)}}$$

- A range penetration of 0% means an employee is paid at range minimum.
- A range penetration of 50% means an employee is halfway through the range–at midpoint.
- A range penetration of 100% means an employee is paid at range maximum.



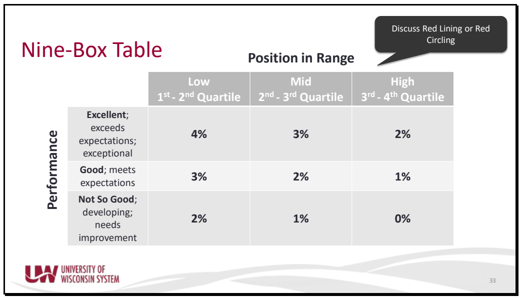


Compa-ratio is a comparison of an employee’s pay versus the market midpoint for similar positions. Compa-ratio is a useful metric to use when setting salary or negotiating raises. It is expressed as a mathematical, comparative (“compa”) ratio that expresses how an employee’s pay rate compares to the midpoint of their range or market:

$$\text{Compa-ratio} = \frac{\text{pay rate}}{\text{range midpoint}} \qquad \text{(Expressed as a percentage or decimal)}$$

- Values of 100% or 1.00 means an employee is paid at or 100%-matched to midpoint or around midpoint of grade.

- Values above 100% (e.g. 115% or 1.15) mean an employee is paid above midpoint or higher in the grade.
- Values below 100% (e.g. 85% or .85) mean an employee is paid below midpoint or lower in grade.



	Low 1st - 2nd Quartile	Mid 2nd - 3rd Quartile	High 3rd - 4th Quartile
Excellent; exceeds expectations; exceptional	4%	3%	2%
Good; meets expectations	3%	2%	1%
Not So Good; developing; needs improvement	2%	1%	0%

Performance adjustment refers to a salary or pay increase due to notable, sustained performance that meets and exceeds established standards of a job. Best practice application would ensure that the high performers will receive a substantially greater increase and/or be within a higher salary range quartile compared to average or less-than-average performers.

Eligibility criteria/factors to consider can include, but are not limited to:

- Employees responsible for supervising staff must be current with all performance evaluations.
- Successfully completed all mandatory training.
- Length or frequency of the outstanding performance.
- Overall significance or importance of the employee’s work products to the institution.
- Regularity with which the outstanding performance or unique contribution is demonstrated (e.g., an employee who routinely demonstrates exceptional performance and performs special projects on an ongoing basis, as compared to an employee who completes a one-time special project).
- Whether the employee,
    - exhibits role model behaviors consistent with University values
    - performs at maximum levels of effectiveness, producing exceptional quality while meeting challenging demands
    - proactively and creatively solves problems resulting in positive change

- frequently seeks opportunities to accomplish additional goals and transformational goals with significant impact
- has acquired additional competencies (e.g., educational attainment, certifications, etc.), which are both specialized and critical in carrying out the permanent functions of the position
- has new permanent job responsibilities and /or responsibilities of growing importance to the institution that have been either newly assigned or were an evolution of their originally assigned functions. The new responsibilities are of greater scope, impact and/or complexity compared to the previous functions but are not substantial enough to bring about a title change.

Performance adjustments should not be communicated to an employee until all approvals have been documented by institution Human Resources units. Employees at or near the maximum of the salary range will receive their performance adjustment via a lump sum payment. No employee may be paid above the maximum of a salary range.

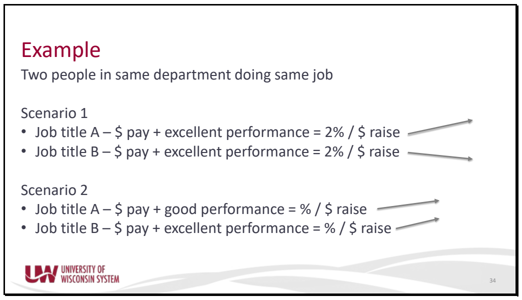
Employees ineligible for merit increases can include, but are not limited to:

- On probation or serving in an evaluation period.
- Currently under a performance improvement plan (PIP).
- Deemed “unsatisfactory” or “does not meet expectations” in some or all areas of performance.

The nine-box table provides guidelines on how to determine appropriate performance adjustment amounts, assuming annual review. This method takes into account performance and where an employee is in their pay range.

As a general rule when approaching all pay adjustments, one should consider equity, parity, the institution’s approach to salary distribution, and available funds.[9]

[9] The salary management concepts within this guidance document can also be applied to the distribution of Pay Plan funds, but the policy structuring the administration of Pay Plan remains UW System Administrative Policy 1278 (formerly TC 4).



These tools can help standardize how to move employees through their pay range and ensure some parity and equity within department/division/campus levels.

Human Resources should work closely with Finance to move people through their range of pay.

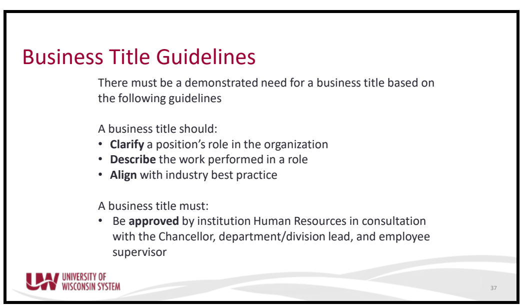
Let's discuss some possible scenarios.

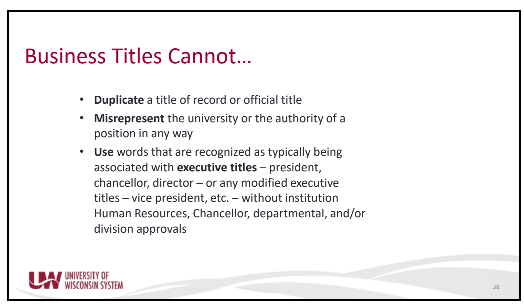
QUESTION: How do these compensation tools help you assess what's fair pay?

QUESTION: When will employees get raises outside of pay plan at your institution?

QUESTION: How much of a raise do employees get?

QUESTION: How will your institution address employees moving into or out of a Limited Appointee position?





The job framework uses titles commonly found in the market to describe the work performed at the University of Wisconsin System.

There may be some instances where a title of record is not the best descriptor of work being performed, nor does it always provide enough detail about the specifics of an individual position within the organization. In this case, a business title may be used by a person in a position to help communicate their role.

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 position.
- Align with industry best practice and naming conventions of other business titles in a job family/group.

A Business Title cannot:

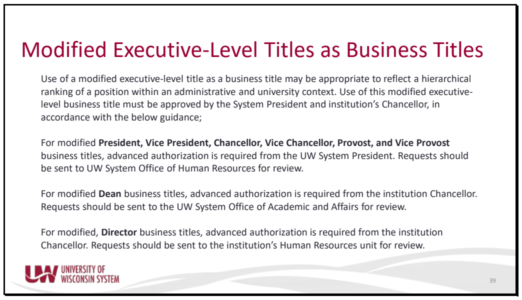
- Duplicate a title of record.
- Misrepresent the university or the authority of a position in any way.
- Use words that are recognized as typically being associated with executive-level or modified executive-level titles without institution Human Resources, departmental, and/or division approvals.

A Business Title may:

- Recognize career status.
- Be used for:
  - Business cards
  - Email signatures
  - Name badges
  - Office signage
  - Stationary
  - Websites or directories
  - Internal and external communications
  - Job postings

A Business Title must:

- Be approved by institution Human Resources in consultation with the position supervisor and department and/or division leadership.



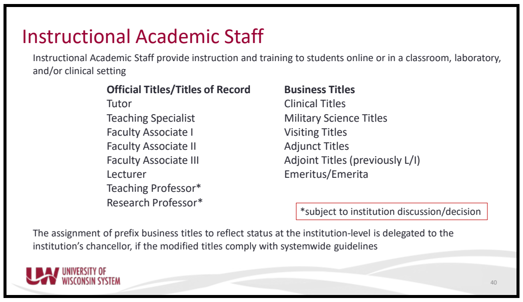
Use of a modified executive-level title as a business title may be appropriate to reflect a hierarchical ranking of a position within an administrative and/or university context. Use of this modified executive-level business title must be approved by the System President and institution's Chancellor, in accordance with the below guidance;

For modified President, Vice President, Chancellor, Vice Chancellor, Provost, and Vice Provost business titles, advanced authorization is required from the University of Wisconsin System President. Requests should be sent to University of Wisconsin System Office of Human Resources for review.

For modified Dean business titles, advanced authorization is required from the institution Chancellor. Requests should be sent to the University of Wisconsin System Office of Academic and Affairs for review.

For modified, Director business titles, advanced authorization is required from the institution Chancellor. Requests should be sent to the institution's Human Resources unit for review.

However, use of business titles may not offer an adequate response to emerging needs among the institutions. Institutions may request additions, deletions, or modifications to the official titling structure (job framework) through University of Wisconsin System Human Resources.



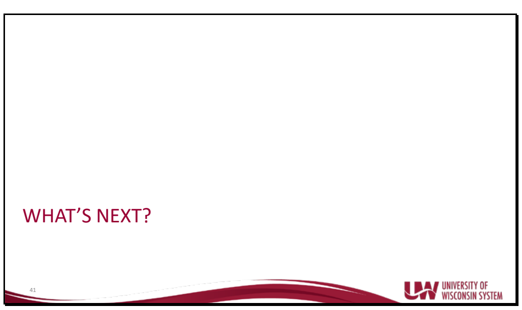
Instructional Academic Staff provide instruction and training to students online or in a classroom, laboratory, and/or clinical setting.

All titles listed are titles currently used, except Teaching Professor and Research Professor.

The use of titles like Teaching Professor and Research Professor are subject to institution discussion and creation of criteria around use of these titles. No one is automatically mapped into those titles. They are included in the standard job description library because subject matter experts identified the possible need for these titles during the review and feedback process, and UW-Madison's faculty governance passed resolutions defining institution-level criteria for the use of these Instructional Academic Staff titles.

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.

What's Next? (Slides 40 – 41) 5 min.



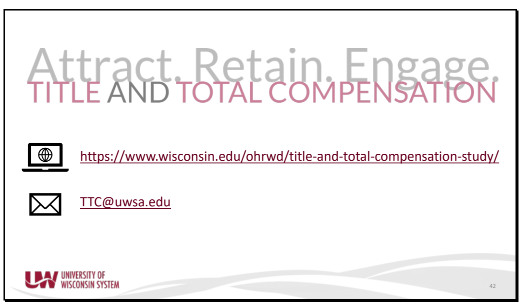
You and your teams should begin considering how the changes discussed today will need to be incorporated into your institution-level policies and business practices.

UW System is your partner in developing these policies and practices.

We plan to follow up Spring 2020 with a TTC HR Training Part 3 that will further dive into the discussion of operationalizing the policy changes at institutions.

We will discuss:

- Salary Administration Changes
- Managing Salaries within the Grade
- Appeals Process
- Business Titles
- Compensation Structure
- Benefits Updates



Thank you for participating. Please send any questions to TTC@uwsa.edu.

After your training, you will receive this presentation and Facilitator Guide.

Frequently Asked Questions by Human Resources:

Q: What is the process to quality check mapping data?

A: The project team (compensation and titling specialists) will take a look at the combined mapping for all UW System employees (UW-Madison + UW System) to check for consistency in mapping.

Q: When will supervisors see their employees' mapping?

A: After the system-level quality check in November, UW System will provide institutions a final workbook for tracking employee-manager conversations and business titles.

Q: What are the lecturer talking points about no more prefixes?

A: Campuses can maintain their current movement of the lecturer title through prefix business titles. There will be new systemwide business title guidelines.

Q: What happened with the Career Paths (OC/M levels)?

A: The project team determined it is a compensation and titling document that will be used for continuous market matching; It is not currently forward facing. Standard job descriptions in the online library will not have OC/M level information.

Q: Will there be more explanation on career paths and career development?

A: The ways employees can develop their careers are detailed in the "What is a Career Path" video.