



WISCONSIN

UNIVERSITY OF WISCONSIN-MADISON

**UNIVERSITY OF
WISCONSIN SYSTEM**





Study Update for the Advisory Council

Title and Total Compensation Study

January 16, 2018

Agenda

1. Introduction and Roll Call
2. Project Timeline
3. Project Status Update
4. Engagement activities – UW System and UW-Madison
5. Benefit Value Analysis Data Cuts
6. Job Framework
7. Job Families and Sub-Families
8. Career Path Levels and Level Descriptors
9. Monthly Advisory Council Report-Out

Project Timeline



I. Design and Study Strategy	II. Assess Positions and Develop New Job Title Structure	III. Create Compensation Structure	V. Implement New Structures
<ul style="list-style-type: none"> Review Data Develop project plan Stakeholder interviews and focus groups Compensation philosophy guiding principles Preliminary communication and change management strategy 	<ul style="list-style-type: none"> Job titling framework Map positions to the titling framework Create/update job descriptions Stakeholder briefings 	<ul style="list-style-type: none"> Analysis of market data Pay range development Salary administration guidelines Stakeholder briefings 	<ul style="list-style-type: none"> Presentation to stakeholders Finalize program based on stakeholder feedback Finalize communication and change strategy Deliver Targeted communications Training for ongoing program administration
	IV. Review Benefits / Work-life and Leave Structures		
	<ul style="list-style-type: none"> Analysis of work/life and leave benefits Gap analysis and recommend solutions Stakeholder briefings 		

Project Status Update

Completed

- Job Framework Components Convergence
 - Job Families and Sub-families
 - Career Path Levels and Level Descriptors

Upcoming

January/February

- JDxpert Job Description Software Tool
 - Design work flow processes
 - Complete design of job description template
 - Begin work on standard job descriptions
- Socialize and gain approval of Job Framework components
- Develop training and communications materials for the job description process rollout

Engagement Activities

UW System

- Each institution completed its review of the 22 job families.
- Each institution is beginning socialization of levels and level descriptors.
- Each institution continued to hold meetings with institution project team and stakeholder groups.
- Continue weekly Title and Total Compensation teleconferences with the UWS Project Steering Committee

UW-Madison

- Job Family Teams
 - Outreach and Collaboration
 - Working Team
 - OHR Collaboration Team
- Conducted 20 Job Family and Sub-Family Listening Sessions:
 - Over 2,800 registered
 - 1,615 Academic Staff and 992 University Staff
 - 829 employees rated the sessions with 95% satisfaction
- Socialization of Study Concepts
 - University Staff Congress
 - Academic Staff Executive Committee
- Bi-monthly updates at HR Representatives meetings
 - Provided materials to add Division discussions

Benefit Value Analysis (BVA)



BUSINESS CHALLENGE

“I need data to help me prevent turnover by gauging the competitiveness of our benefits plans in comparison to our peer groups while making sure we are not overpaying.”



BVA ADVANTAGE

The **Benefits Valuation Analysis (BVA)** is a custom, comparative, benchmarking report that analyzes how benefit plans compare to a chosen peer group in degrees of increasing specificity – by all plans together, by plan groupings, and by individual plans.



THE SOLUTION

Get detailed descriptions of plan provisions, understand comparisons of employee profiles, and see the estimated amount of pretax salary an employee needs to replace benefits.



Plan Value Comparisons

Shows how benefit plans' market replacement value compares to peers.



Employee Profile Comparisons

Values, rankings and indices to assess value and competitiveness of benefit plan through a **sample** census / workforce.



Summary of Plan Features

Information of major employee benefit plan types including retirement/savings, health/group and time loss benefits.

Benefit Value Analysis (BVA)



DESCRIPTION OF BENEFITS COLLECTION

The following elements will be collected for the various employee groups.

Defined Benefit Plans

- Final average
- Service credit
- Cash balance
- Retirement equity
- Career average

Stock Purchase Plan

Health Plans

- Medical, Retiree medical
- Dental, Retiree dental
- Employer-paid life insurance
- Flexible benefits plan
- Flexible spending accounts

Defined Contribution Plans

- 401(k)/403(b)
- Profit sharing

Money purchase

- 457 deferred compensation
- ESOP
- 401(a)

Time Loss Plans

- Sick pay
- Short-term disability
- Long-term disability
- Paid-time off
- Vacation
- Holidays
- Personal days
- Sabbatical leave

Work Flexibility

- Flextime
- Free/subsidized parking

Telecommuting

- Satellite workplace
- Work at home
- Business casual
- Job sharing

Wellness/Fitness

- Subsidized eating facility
- Wellness Program
- Onsite Fitness Facility
- Paid/Subsidized Offsite Fitness

Financial Assistance

- Discount Purchasing
- Legal Counseling
- Financial Planning Assistance
- Gambling Addiction Counseling

Family Assistance

- Funeral Leave
- College Scholarships
- Employee Assistance Plan
- Child/Elder Care
- Lactation Rooms
- Adoption Benefits
- Onsite Child Care
- Educational Assistance
- Severance
- Vision
- Long-term Care

BVA Data Cuts

UW-MADISON – Data Cut #1			
Institution		Selection Source	Data Source
1.	University of California-Berkeley	Official Peer *	Mercer Data
2.	University of California-Los Angeles	Official Peer *	Mercer Data
3.	University of Michigan-Ann Arbor	Official Peer *	Mercer Data
4.	University of Texas-Austin	Official Peer *	^TBD
5.	Ohio State University	Official Peer *	Mercer Data
6.	Purdue University	Official Peer *	Mercer Data
7.	University of Illinois-Urbana	Official Peer *	Mercer Data
8.	University of Minnesota-Twin Cities	Official Peer *	Mercer Data
9.	Indiana University-Bloomington	Official Peer *	Mercer Data
10.	Michigan State University	Official Peer *	^TBD
11.	University of Washington-Seattle	Official Peer *	Mercer Data

*Official Peers Adopted March 30, 1984 – Executive Order #27, Governor Anthony Earl

**Official System Peer Adopted May 6, 1994 – Resolution 6664, Board of Regents

^TBD - Data source to be confirmed or determined by Mercer

BVA Data Cuts

UW SYSTEM – Data Cut #2			
Institution		Selection Source	Data Source
1.	Cleveland State University	Milwaukee Official Peer*	Mercer Data
2.	SUNY-Buffalo	Milwaukee Official Peer*	Mercer Data
3.	Marquette University	Milwaukee Competitor	Mercer Data
4.	Indiana University	Comprehensive Official Peer* <i>(Northwest, South Bend, Purdue, Southeast)</i>	Mercer Data <i>(All IN schools have the same benefits)</i>
5.	University of Illinois	Comprehensive Official Peer* <i>(Springfield)</i>	Mercer Data <i>(All IL schools have the same benefits)</i>
6.	University of Michigan	Comprehensive Official Peer* <i>(Dearborn, Flint)</i>	Mercer Data <i>(All MI schools have the same benefits)</i>
7.	University of Minnesota – Duluth	Comprehensive Official Peer*	Mercer Data
8.	University of Minnesota – Twin Cities	Competitor	Mercer Data
9.	Minnesota State Colleges and Universities (MnSCU)	Comprehensive Official Peer* <i>(Bemidji, Mankato, Moorhead, St. Cloud, Winona)</i>	^TBD
10.	Purdue University	Comprehensive Official Peer* <i>(Calumet)</i>	Mercer Data <i>(assumes benefits are same)</i>
11.	University of California	System Official Peer**	Mercer Data <i>(assumes a system)</i>
12.	University of North Carolina	System Official Peer**	Mercer Data <i>(assumes a system)</i>
13.	University of Texas System	System Official Peer**	Mercer Data
14.	University of Missouri – Kansas City	Milwaukee Official Peer*	Mercer Data

*Official Peers Adopted March 30, 1984 – Executive Order #27, Governor Anthony Earl

**Official System Peer Adopted May 6, 1994 – Resolution 6664, Board of Regents

^TBD - Data source to be confirmed or determined by Mercer

BVA Data Cuts

UW-MADISON & UW SYSTEM – Data Cut #3			
Organizations		Requested by	Data Source
1.	A.O. Smith Corporation	UW-Madison	Mercer Data
2.	Agropur, Inc. (USA)	UW-Madison	Mercer Data
3.	CUNA Mutual Group	UW-Madison	Mercer Data
4.	Kohler Company	UW-Madison	Mercer Data
5.	Schneider National, Inc.	UW-Madison	Mercer Data
6.	TDS Telecom	UW-Madison	Mercer Data
7.	UW Health (UWHC, UW Foundations, UW Health)	UW-Madison	^TBD
8.	SSM Health	UW-Madison	^TBD
9.	EPIC	UW-Madison	^TBD
10.	Madison Metropolitan School District	UW-Madison	^TBD
11.	City of Madison	UW-Madison	^TBD
12.	Wisconsin Technical Colleges	UW-Madison & UW System	^TBD
13.	3 M	UW System	Mercer Data
14.	K-12 Wisconsin in UWS Communities	UW System	^TBD
15.	Kwik Trip	UW System	^TBD
16.	Wipfli LLP	UW System	Mercer Data
17.	Covance Laboratories – Madison, WI	UW-Madison	^TBD
18.	Promega Corporation	UW-Madison	^TBD
19.	WPS Health Insurance	UW-Madison	^TBD
20.	Sonicfoundry	UW-Madison	^TBD
21.	Baker Tilly Virchow Krause, LLP	UW-Madison	^TBD
22.	CDW	UW-Madison	^TBD
23.	ExactSciences Corporation	UW-Madison	^TBD

^TBD - Data source to be confirmed or determined by Mercer

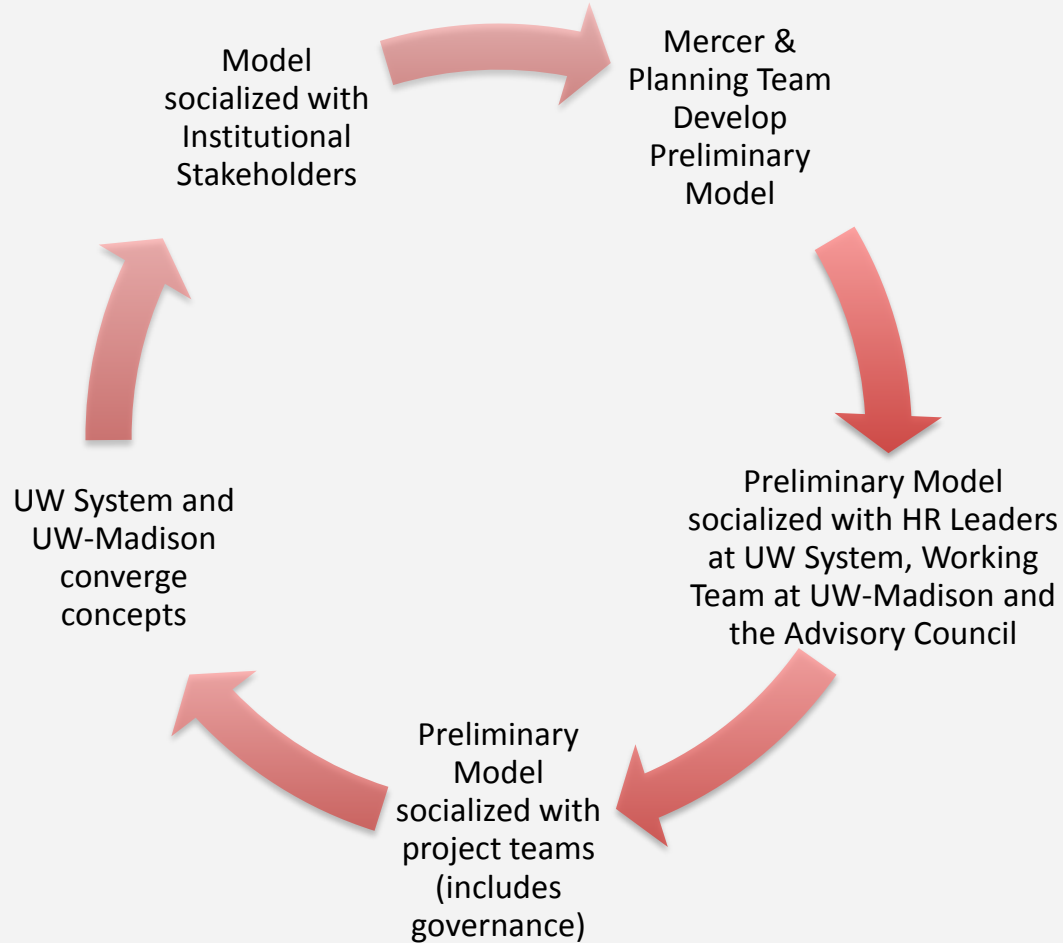
BVA Data Cuts

UW-MADISON – Data Cut #4			
Institution		Selection Source	Data Source
1.	Boston University	#37 Ranking & 4 departed Faculty	Mercer Data
2.	Cornell University	#14 Ranking & 3 departed Faculty	Mercer Data
3.	Duke University	#9 Ranking & 6 departed Faculty	Mercer Data
4.	Emory University	#21 Ranking & 3 departed Faculty	Mercer Data
5.	Harvard University	#2 Ranking & 3 departed Faculty	Mercer Data
6.	Northwestern University	#11 Ranking & 5 departed Faculty	Mercer Data
7.	Syracuse University	#61 Ranking & 3 departed Faculty	Mercer Data
8.	University of Pennsylvania	#8 Ranking & 3 Faculty received offers	Mercer Data
9.	University of Rochester	#34 Ranking & 3 departed Faculty	Mercer Data
10.	Yale University	#3 Tie Ranking & 6 departed Faculty	Mercer Data
11.	University of Chicago	#3 Tie Ranking	Mercer Data
12.	Stanford University	#5 Tie Ranking	Mercer Data

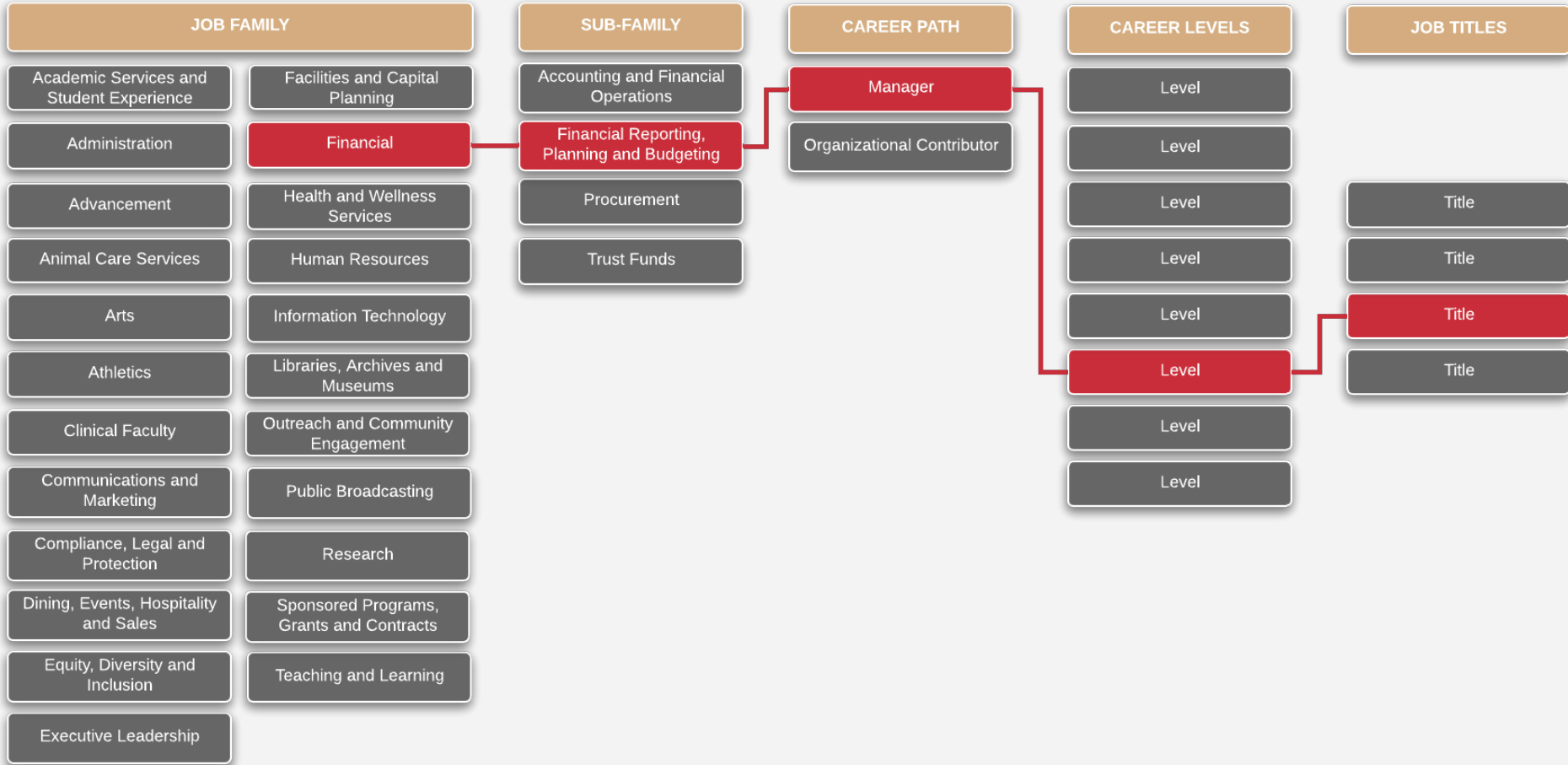
Departed Faculty reported by APIR includes number of faculty who left between Fiscal '08 and Fiscal '17

Faculty received offers reported by APIR includes number of faculty who received an offer from another institution between Fiscal'16&'17

Job Framework – Iterative Process



Job Framework



Job Families and Sub-families

- A **Job Family** is a group of jobs that involve similar work and require similar training, skills, knowledge, and expertise.
- A **Sub-Family** is a smaller group of jobs within a larger job family. Sub-families describe specialized functions.

Job families and sub-families are helpful to compare and organize related jobs across all UW institutions.

Illustrative Example Leveling Guide

	Level Descriptor	Organizational Impact	Complexity of Work	Independence and Supervision	Leadership and Talent Management	Knowledge and Experience
OC5	Level 5	<p>...complex problems...</p> <p>...Job duties may include creation and administration of large projects or system improvements. Job duties may involve development of departmental goals and operational standards...</p>	<p>...analysis and judgement to develop alternate solutions, both long and short term...</p>	<p>...Work outcomes are reviewed against short-to mid-term objectives.</p>		<p>...and theories...</p> <p>... Experience administering projects, programs and processes is preferred...</p> <p>...Bachelor's, Master's may be preferred and at least 5 years of increasingly more responsible relevant work experience...</p>
OC4	Level 4	<p>...defined projects/programs. Decisions typically impact own team...</p>	<p>...analysis and judgement within defined boundaries to develop alternate solutions...</p>	<p>...Work is evaluated upon completion to ensure objectives have been met.</p>		<p>Incumbents generally possess a Bachelor's and at least 3 years of relevant work experience or equivalent of education and work experience.</p>

Note: UW System will not have specified years of experience in its description of knowledge and experience.

Illustrative Example of Two Leveling Guide Relationships to Standard Job Description

Career Services Advisor Level 4	
Job Family	Academic Services and Student Experience
Sub-Family	Career Services & Student Professional Development
Typical Functions	<ul style="list-style-type: none"> • Provide career counseling including administering self-assessments, goal setting and planning, and providing one-on-one counseling (30%) • Foster relationships with employers and alumni to cultivate meaningful career outcome opportunities (20%) • Assist students in obtaining internships, employment, or advanced education by helping with resume preparation, interviewing skills, and graduate and professional school applications (20%) • In charge of honors student group activities and social networking (30%)
Qualifications	<p>Typically requires broad knowledge of principles and practices in a field or specialty.</p> <p>Incumbents generally possess a Bachelor's and at least 3 years of relevant work experience or equivalent of education and work experience.</p>

Career Services Advisor Level 5	
Job Family	Academic Services and Student Experience
Sub-Family	Career Services & Student Professional Development
Typical Functions	<ul style="list-style-type: none"> • Provide career counseling including administering self-assessments, goal setting and planning, and providing one-on-one counseling. (30%) • Develop new tools and techniques to deliver career counseling. Train staff on new processes. (30%) • Foster relationships with employers and alumni to cultivate meaningful career outcome opportunities.(20%) • Develop department programs to grow the employer and alumni network. (20%)
Qualifications	<p>Incumbents generally possess a Bachelor's, Master's may be preferred and at least 5 years of increasingly more responsible relevant work experience or equivalent of education and work experience.</p>

Example only displays two of the levels in this series. Note: UW System will not have specified years of experience in its description of knowledge and experience.

Advisory Council Report Out

Advisory Council members provide updates on TTC-related engagement activities:

- Ways in which you engaged constituent groups (e.g. group email, focus group, face-to-face, stakeholder meetings, web-postings, blogs, etc.)
- Interactions you had with your institution HR directors? Project teams? Workgroups?
- Specific concerns employees raised with you about the study
- Other issues or concerns would you like to bring forward

Thank you!