

# Classification and Compensation Study

City of Madison, WI



- Firm introduction
- Project team
- Project overview
- Project timeline
- Employee role



#### **About Us**

#### **Baker Tilly**

- Headquartered in Chicago, IL
- Baker Tilly has existed for more than 90 years, and local governments were some of our first clients!
- 85 + years of industry specialization

#### **Public Sector**

- 650+ specialized government professionals
- Serving 4,200+ government clients

#### **Compensation Consulting**

- 30+ years of providing similar services to local governments
- Conducted more than 500+ studies since 2012
- Specifically focused on providing compensation services
- Have our own point factor job evaluation tool, called SAFE



















### **Our Footprint**

#### Organizations we work with

- City, Town, Township, Village, County, Parish
- Bridge, Tunnel Authority
- Community Development Agency
- Housing, Redevelopment Authority
- Library
- Metropolitan Planning Organization
- Public Employee Retirement System
- Public Health Agency
- Public Power (electric)
- Public Schools (k12)
- Tollway Authority
- Transportation (bus, rail, airport)
- Utilities (water, wastewater)
- Watershed/River Authority



#### **Current Clients / Projects**

- Beltrami County, MN
- Columbus, OH
- Compton, CA
- Kansas City Police Department
- LaCrosse Utilities, WI
- Lake County, IL
- Middletown, CT
- Milwaukee Metro Sewer District

- Pasco, WA
- Paso Robles, CA
- Savannah, GA
- Seattle Housing Authority
- Sioux City, IA
- Summit County, CO
- Ulster County, NY
- Weld County, CO

#### **Our Wisconsin presence**

Baker Tilly understands Wisconsin, its businesses and its industries because we've been a part of your state's fabric for more than 90 years.

We were founded in Wisconsin, and it is home to our largest business unit.







# **Our Compensation Consulting Team**



Jay Borcena Consultant, CCP in progress California



Nic Cahala Monteagudo Consultant, CCA, PHR Wisconsin



**Jennifer Curtis** Director. SPHR, CLRM Texas



**Christine Frost** Manager

Illinois



**Marti Gregory** Consultant, CCA California



Janet Jackson Consultant. CCP in progress Arizona



Jada Kent Director, Practice Leader CCP, CLRP **Texas** 



**Thomas Patton** Consultant, CCA, CCP in progress Texas



Valerie Sauer Consultant, DEI **North Carolina** 



Lexi Scholten Manager, CCA. CLRP Minnesota



Sarah Towne Manager, CCA **North Carolina** 

## **Project Overview**

#### **Project Initiation**

- <u>Planning meetings</u> to establish goals and working relationships
  - Department Director Questionnaire (DDQ)
  - Timeline + Communication
  - · Data collection:
    - Pay structures
    - Policy handbook
    - Job descriptions
    - Organization charts
    - Union or collective bargaining contracts
    - Census file (names, salaries, hire dates, etc.)
- <u>Communication meetings</u> for department heads and employees to learn about the study, to ask questions, walk through the PAQ.
- Position Analysis Questionnaires (PAQs)
  - Tell us in your own words about the work you perform
  - · PAQs routed to supervisors for review



## **Project Overview**

#### **Position Review**

- <u>Title Review</u>: We will review all titles and make recommendations for adjustments, as necessary
- Job Evaluation: We will conduct job evaluation using our point factor tool, called SAFE®. This process will establish a hierarchy of jobs within the organization that is reflective of internal equity.
  - This is a measurement of the position, NOT the person in the position
- The 9 compensable factors:
  - 1. Education
  - 2. Experience
  - 3. Level of Work
  - 4. Human Interaction
  - 5. Physical Demands

- 6. Working Conditions
- 7. Independence of Actions
- 8. Impact on the Organization/Community
- 9. Supervision Exercised
- SAFE is compatible and compliant with the Federal Equal Pay Act and Wisconsin's Fair Employment Law



### **Project Overview**

#### **Market Assessment**

- <u>Peer Organizations (16)</u>: We will partner with the City to identify comparable and competitive peer organizations to include in the study.
  - Published salary survey data will be included to represent the private sector.
- <u>Benchmark Positions</u>: 560 positions out of 700 (80%) will be included as benchmarks in the survey.
- <u>Data Adjustment:</u> Some adjustments may be made to collected data to account for differences in work week, fiscal year, and geographic labor cost. We do not weight the data.
- Quality and Quantity Control: As a best practice, a "good match" is 75% overlap in duties and responsibilities + we require at least 3 or more matches per benchmark
- <u>Market Report:</u> reports demonstrating market averages and a comparison to the market will be prepared for review.
- <u>Benefits Comparison</u>: We will collect data on pay plans, pay policies, pay differentials, paid time off, medical premiums, retirement, and other pay and benefits program information for comparison to the City's offerings.



### **Project Overview**

#### **Pay Plan Development**

- Pay Plan: We can utilize your existing pay plan and provide recommendations that are tailored to the study's results.
- Grade assignments will be based on internal equity (job evaluation), external equity (market), and existing equity (current midpoints and grade groupings) with consideration to career progressions, supervisor separation, business needs, etc.
  - We may recommend including department heads in a preliminary review of grade assignments.
- <u>Implementation</u>: We will prepare implementation calculations across 3 scenarios that will assist your organization in adopting the new classification and compensation system.
- Pay Policy Review: Using data collected from the benefits study and best practice, we will provide the City with recommended changes or additions to its policies describing how pay is administered.



#### **Project Overview**

#### **Project Completion**

- <u>Final report</u>: We will document the methodology used to conduct the study, our findings, and recommendations.
- <u>Final presentation(s)</u>: We can present the results to elected officials, senior leadership, employees, and/or designated staff, as desired.
- All project documentation will be delivered.
- <u>Training</u>: We will provide training to HR staff to administer and maintain the new classification and compensation system – including the SAFE® job evaluation process.
- Employee Pay Equity Review: We will analyze current and historical employee and pay data compiled by the City regarding specific factors expected to influence pay and determine to what extent protected characteristics (gender, race, and age) may influence employees' compensation, if any.



# **Project Timeline by Phase**

Phase/Tasks	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
<ul> <li>Data Collection</li> <li>Planning Meetings</li> <li>Data Request</li> <li>Kickoff/Communication Meetings</li> <li>PAQ Coordination</li> </ul>	Ph	ase 1										
Position Review - Title review - Preliminarily job evaluation - Job evaluation training / review			Pha	se 2								
<ul> <li>Market Assessment</li> <li>Peers and Benchmark Positions</li> <li>Market Campaign, Field Survey</li> <li>Market Matching, Data Entry</li> <li>Quality Control, Market Review</li> <li>Benefits Comparison</li> </ul>					Pha	se 3						
Pay Design - Pay Plan Development, Grade Assignments - Review and Feedback / Finalize - Implementation Cost Analysis - Pay Policy Review and Recommendations							Pl	nase 4				
Project Completion - Final Report - Final Presentation / Communication - Training									Pł	nase 5		
Pay Equity - Data Collection, Setup - Regression - Report and Recommendations											Pay E	quity

Employee Participation

# **Your role in the study - PAQs**

- To properly review and evaluate positions, we need employee input!
- You are asked to complete an <u>online</u> Position Analysis Questionnaire (PAQ) which will allow you to provide details, in your own words, about the work performed in your position's title.
- PAQs will be distributed to your work email address with a link to access the questionnaire.
- Email from: admin@bakertillyusprod.appiancloud.com
- You may download a copy of your PAQ responses before you click "submit."
- Once submitted, your PAQ is routed to your supervisor for review.



- Explain the position, not the person in the position.
- We're asking for the minimum requirements of the position and not your personal level of education/experience.
- Employees in the same title with similar responsibilities can collaborate to submit one PAQ as a group.
- However, if you're in the same title and NOT performing the same tasks, please complete your own PAQ.
- PAQ's will be routed to supervisors to review.
- Supervisors are asked to review PAQs for accuracy and completeness and can provide feedback but <u>cannot</u> change the employee's original responses.
  - PAQs will be distributed: Monday, July 22
  - Two weeks to complete, due: Monday, August 5
  - Supervisor review due: Monday, August 12

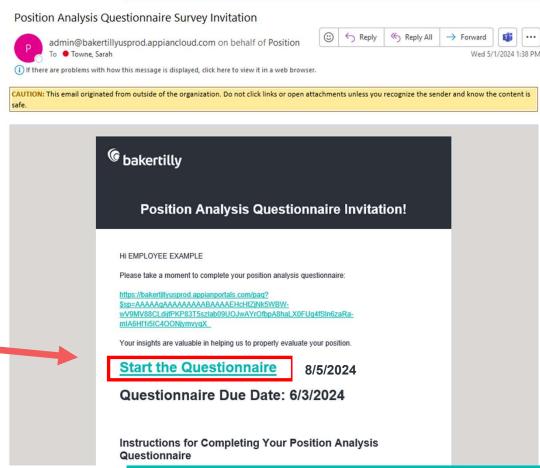
#### **Frequently Asked Questions**

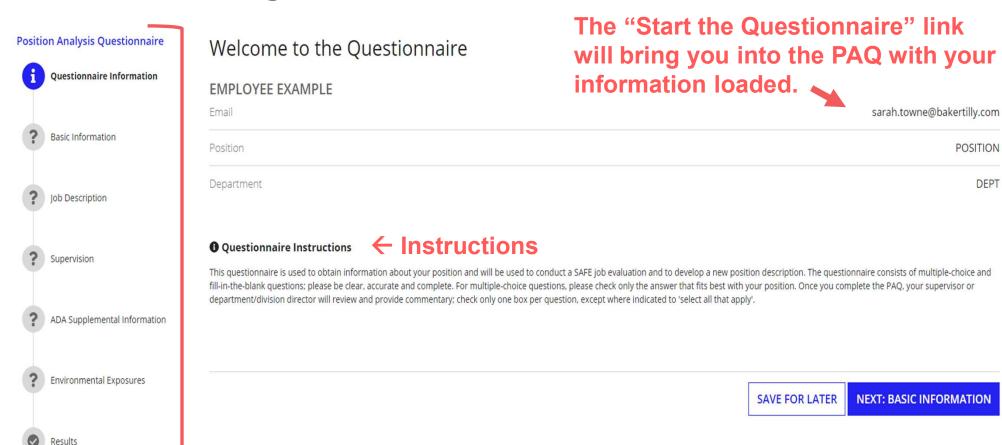
14/11			10.00	- 10
WIII	my	lob	pe	cut?

- No. We are only looking at what jobs exist, what work is performed, and what is the value of that work.
- Will my salary be cut?
  - Baker Tilly does not recommend pay decreases as a result of the study.
- Will my salary increase?
  - Possibly, but no guarantee. This study will recalibrate the City's classification and compensation plan and that may mean individual salaries will need to be adjusted to fit into the new plan. The study may find that some positions were where they should be and adjustments may not take place.
- ☐ Is my performance being considered?
  - **No**. We are only looking at the position, not the person in the position.
- ☐ What are essential functions? How do I account for duties that I only perform part of the year?
  - We are looking for the MAJOR duties completed in your position. Consider all the tasks you are responsible for annually and how much time you spend on each. Some tasks may be consolidated.
- ☐ How many duties can I include?
  - The online PAQ will allow up to 15 entries, but you only need to provide enough to capture the major duties of your position.
- ☐ I have temporarily taken on duties from a position that is vacant, do I include those?
  - Unless your supervisor has indicated the vacant position has been eliminated and the additional duties are permanent to your role, do not include those tasks.

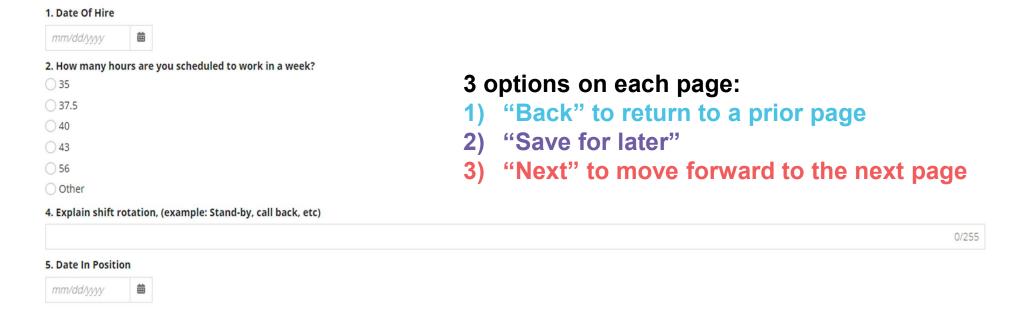
Employees will receive an email invitation to complete the PAQ.

Click "Start the Questionnaire" to open the Baker Tilly Appian homepage





**←** Navigation information







6. Job Summary - Briefly describe the purpose of your job in one (1) to three (3) sentences or phrases. This summary will describe your job in a manner similar to a job advertisement. It is a summary of the job's principal duties, as you might explain if someone asked you about your work. It is not intended to be an exhaustive list of duties and responsibilities. Start with an action verb describing the main covered by that statement, adding the object of that activity and conclude with the person, group or for whom the work is performed. What do you do, how, and for who? example: "Maintains facility and surrounding grounds by conducting minor maintenance, repair, landscaping, and custodial activities for the Parks and Recreation Department."

#### You can recycle the summary from your existing JD if it is accurate. Or you can write a new summary, please use the example included.

0/500

7. Essential Functions/List of Duties - Essential functions are the major duties performed - they are the reason the job exists. In writing each essential function, try to be as clear and concise as possible. Tip: focus on the goal and not the method for achieving it. Beginning each essential function with a verb is helpful (analyzes, develops, directs, coordinates, establishes, manages, responds, repairs, etc.) Please avoid abbreviations and jargon. In the right column, indicate the percentage of your time devoted to each entry. The total should amount to 100%. Duties that account for 10% or less of your time may not be a major function and can, instead, be lumped in with other entries. For duties that only take place part of the year, consider the percentage of time over a 1-year period this task is performed.

Description		Percentage	Delete
Task 1	6/255	30	×
Task 2	6/255	30	×
Task 3	6/255	50	×
Total (Should be 100%)		110%	
• Add Response			

You can enter up to 15 essential functions. Each will need a % of time the activity is completed on an annual basis.

8. Current Title - Do you think your current position title appropriately reflects the work?

Yes

No

9. If No, please provide the title that would be more appropriate

17/255

What title best reflects the work performed?

10. Which, if any, position titles does your position duties and responsibilities overlap with?

0/255

11. Which, if any, position titles fill in for you or perform your duties and responsibilities when you are absent or away?

In considering current or recommended titles, understanding where your position does and does not overlap with other positions is helpful.

13. Education - Please ind	cate the minimum education level required t	o complete the normal, day-to-day tasks of this position						
Less than High School D	ploma or GED							
O High School Diploma or	GED	Minimum requirements of the position in	ot what					
Associates Degree		Minimum requirements of the position, no						
Bachelors degree	education and experience you may personally hold.							
Masters degree								
○ PhD								
15. Please indicate the mi	nimum experience level required to complete	e the normal, day-to-day tasks of this position						
○ No Experience								
Less than one year (min	nal)							
One to three years (mod	erate)							
Three through five years	(considerable)							
Six or more years (exten	sive)							
	and Registrations - Please indicate if there are n may be provided in the Supervisor's Comme	e any licenses, certificates and/or registrations required to perform your job (e.g., driver's licens ents section below)	e) (Supervisor's commer	nts				
License			Are these Required?	Delete				
Add Parpage		qualifications and when they are required months, within 1 year, etc.						
Add Response								

17. Work Level of Work required to complete your normal, day-to-day duties satisfactorily.
○ Handles every day, reoccurring basic assignments and problems.
Handles a variety of typical assignments and problems independently
Senior or supervisory level; handles advanced tasks and problems except those requiring policy or procedural change
Managerial in nature; directs all assignments and deals with all problems
18. Work Complexity - Complexity and difficulty level associated with the tasks necessary to complete your work. Consider the level of judgment, analytical ability and creativity required and wheth there are standards, policies and procedures that guide your actions.
Regular and repetitive tasks, processes or operations requiring the selection and execution of actions based on defined procedures
Fairly standard procedures and tasks where basic analytical ability is required, such as comparison of numbers and facts to select the correct actions. Detailed guidelines and procedures are generally used to make decisions or determine actions.
Requires the application of a variety of procedures, policies and/or precedents and moderate analytic ability in adapting standard methods to fit facts and conditions.
Considerable analytical ability is needed to select, evaluate and interpret data from several sources; interpretation of guidelines, policies and procedures is required
Widely varied and involving many complex and significant variables, requiring analytical ability and inductive thinking in adapting policies, procedures and methods to fit unusual and complex situations
19. Working Conditions - Conditions you are subjected to during your day-to-day duties:
○ Absence of disagreeable conditions
O Involves occasional exposure to some disagreeable elements (dust, heat, fumes, cold, noise, vibration or wetness) and accidents are improbable other than minor injuries
One or more elements above; involves frequent exposure to hazards where lost-time accidents are definitely possible
Several elements above are occasionally present to the extent of being objectionable or regular exposure to work situations that could result in incapacitating accidents or, on occasion, loss of lif
One or more of the above elements are regularly present and objectionable, or continuing exposure to work situations that could result in incapacitating accidents or periodic exposure to situations involving hazards that could result in total disability, critical illness or loss of life
Continuous exposure to work situations involving hazards that could result in total disability, critical illness or loss of life, despite the provision and/or implementation of available safety measure

20. Interpersonal Skills and Communication Skills - Skills required during your day-to-day duties
Little or no contact required except with immediate associates and direct supervisor
Regular contact within the department, periodic contacts with other departments, outside agencies and the general public
Regular contact within the department and other departments, outside agencies and general public (supplying or seeking information) on specialized matter
Outside and inside contacts to carry out organization programs or occasional contacts with officials at higher levels on matters requiring cooperation, explanation and persuasion, or work requiring enforcement of laws, ordinances, policies and procedures
Regular contact with persons of importance and influence involving considerable tact, discretion and persuasion
Ontinuing contact involving difficult negotiations calling for well-developed sense of timing and strategy; representing department or organization in policy settings
21. Level of Responsibility - How much freedom or independence is required or allowed in the performance of your normal duties:
Close supervision, or tasks are so routine and standardized that they do not require supervision
OModerate supervision within standard operating procedures; supervisor or senior workers are generally nearby to answer questions, make judgment calls and/or prioritize work
Limited supervision with general autonomy in determining how objectives are achieved; supervisors generally set operating benchmarks, goals and objectives
General direction, based on broad goals and policies
<ul> <li>Involves setting policies and goals for the department or organization operation.</li> </ul>
22. Organizational Impact and Consequences - How your daily duties impact the organization and the consequences of those duties:
Supportive, informational, recording or other services to assist others in producing correct and effective results; minor consequences.
Assisting and supporting others or individually providing data or facilitating services for use by others; minor to moderate consequence.
Oaily actions or services affect individual clients/citizens; activity has moderate impact on specific cases in service area
O Participating with others (within and/or outside of community/agency) in program development, service delivery and supervision of subordinate staff; moderate to serious impact
Major individual impact on and accountability for end results affecting organizational unit or total community/agency
A value is required

O No

<ul><li>23. Do you supervise people?</li><li>Yes</li></ul>	If "No" - you will not have to answer the following qu	estions		
○ No				
24. Please check all that apply				
Work Group/Team				
Department				
Unit/Section				
Division				
Organization				
25. Can you list the positions b	y title and number of individuals?			
• Yes				
○ No				
26. List the positions by title, a	long with number of individuals within the position, that you have responsibility for:			
Position/Title			No. Individuals	Delete
Administrative Assistant	Please use position titles, not names of individuals	24/255	2	×
Maintenance Worker		18/255	5	×
• Add Response				
27. For the positions listed abo	ve, do you effectively recommend or take action on the following:			

#### 28. Which of the following actions do you take?

			Delete
Hire		Please Select a Value ▼	×
Assign Work		Please Select a Value ▼	×
Reward		Please Select a Value ▼	×
Transfer	Options:	Please Select a Value ▼	×
Promote	<ul> <li>Effectively Recommend</li> </ul>	Please Select a Value ▼	×
Address Grievances	Take Action	Please Select a Value ▼	×
Train	• N/A	Please Select a Value ▼	×
Inspect Work	· N/A	Please Select a Value ▼	×
Suspend		Please Select a Value ▼	×
Terminate		Please Select a Value ▼	×
Discipline (Oral Reprimand)		Please Select a Value ▼	×
Discipline (Written Reprimand)		Please Select a Value ▼	×
Evaluate Performance		Please Select a Value ▼	×
Demote		Please Select a Value ▼	×
Coach and/or Counsel		Please Select a Value ▼	×
Develop Staff Schedules		Please Select a Value ▼	×
• Add Response			

To assist in developing class descriptions that recognize and accommodate the requirements of the Act, each employee is requested to complete the ADA supplemental information form. Please check only those physical requirements or activities and sensory requirements that are necessary to perform the essential functions of your job and those environmental conditions which apply.

29. Physical Exertion (pounds) - This refers to the amount of force exerted on a day-to-day basis as a requirement of your position. The exertion refers to using personal force and strength to push, pull, or lift. This does not refer to items you use machinery to push, pull, or lift such that physical force is not required. Select the appropriate choice for each row.

Pounds		Response	Delete
Up to 10 pounds of force	Options:	Please Select a Value ▼	×
Up to 25 pounds of force	Seldom or Never	Please Select a Value ▼	×
Up to 50 pounds of force	Sometimes	Please Select a Value ▼	×
Up to 100 pounds of force	<ul> <li>Frequently or Most of the time</li> </ul>	Please Select a Value ▼	×
100 pounds or more of force		Please Select a Value ▼	×

30. If you responded sometimes or frequently, please provide examples of your duties that require the selected level of physical exertion.

#### Please provide examples

0/500

31. Physical Activity - This refers to the amount of time you spend sitting, walking, or standing on a day-to-day basis. Select the appropriate choice for each row.

	Response	Delete
Stand	Please Select a Value ▼	×
Walk	Please Select a Value ▼	×
Sit	Please Select a Value ▼	×



32. Physical Agility - This refers to requirements involving movements such as climbing, stooping, kneeling, crouching, crawling, reaching, pushing, pulling, repetitive movements and manual dexterity. Select the appropriate choice for each row.

		Response	Delet
Climb or balance	Options:	Please Select a Value ▼	×
Stoop, kneel, crouch or crawl	Coldom or Nover	Please Select a Value ▼	×
Reach with hands and arms	Seldom or Never	Please Select a Value ▼	×
Taste or smell	• Sometimes	Please Select a Value ▼	×
Push or pull	<ul> <li>Frequently or Most of the time</li> </ul>	Please Select a Value ▼	×
Grasp, manipulate or make small precise hand movements		Please Select a Value ▼	×
Make repetitive motions		Please Select a Value ▼	×

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-	Add	Respor	250
v	Add	VEZNOI	126

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- 33. Sensory Requirements: Vision This refers to the vision requirements. Select the choice that best reflects the requirements in your position.
- Standard vision requirements
- Special vision requirements close and distance vision, ability to adjust focus, depth perception, color perception, night vision and/or peripheral vision
- 35. Sensory Requirements: Vocal This refers to the vocal communications requirements. Select the choice that best reflects the requirements in your position.
- Ability to express ideas
- Ability to express detailed or important instructions to others accurately, loudly, and/or quickly
- 36. Sensory Requirements: Hearing This refers to the auditory or hearing requirements. Select the choice that best reflects the requirements in your position.
- Standard hearing requirement
- Operation Detailed hearing requirements: hear detailed information through oral communication and/or make fine distinctions in sound



37. Environmental exposures - this refers to the specific disagreeable or hazardous conditions encountered as a result of day-to-day responsibilities in your position. Select the choice for each row.

			Delete
Work near moving mechanical parts	Options:	Please Select a Value ▼	×
Work in high, precarious place		Please Select a Value ▼	×
Toxic or caustic chemicals	<ul> <li>Seldom or Never</li> </ul>	Please Select a Value ▼	×
Outdoor weather conditions	• Sometimes	Please Select a Value ▼	×
Extreme cold (non-weather)	<ul> <li>Frequently or Most of the time</li> </ul>	Please Select a Value ▼	×
Extreme heat (non-weather)		Please Select a Value ▼	×
Moderate to very loud noise level		Please Select a Value ▼	×
Blood borne pathogens	21/255	Please Select a Value ▼	×
Communicable diseases	21/255	Please Select a Value ▼	×

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Can "Save For Later" from every page.



You do not have to complete the PAQ all at once.

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#### Position Analysis Questionnaire

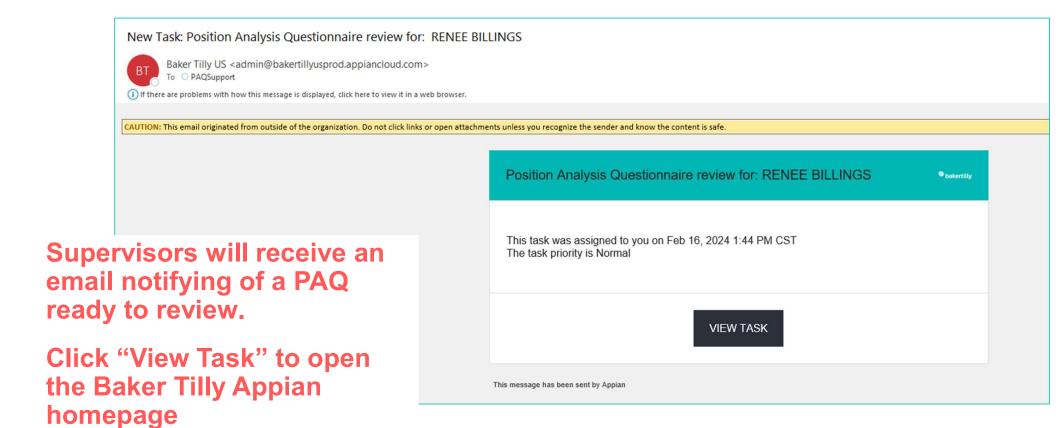
- Questionnaire Information
- Basic Information
- Job Description
- Supervision
- ADA Supplemental Information
- **Environmental Exposures**
- Results

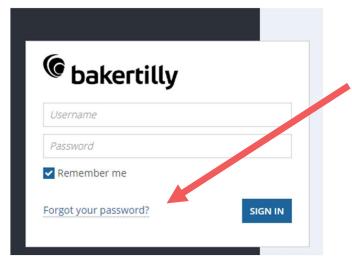
#### Survey Result

You have completed 100% of your questionnaire, do you want to submit your questionnaire?



- ✓ Once you complete the PAQ, you can still "Save For Later" if you want to come back to review.
- ✓ Once you click "Submit" you will not be able to edit or make changes to your PAQ.
- ✓ After you "Submit" your PAQ will be routed to your supervisor for review.

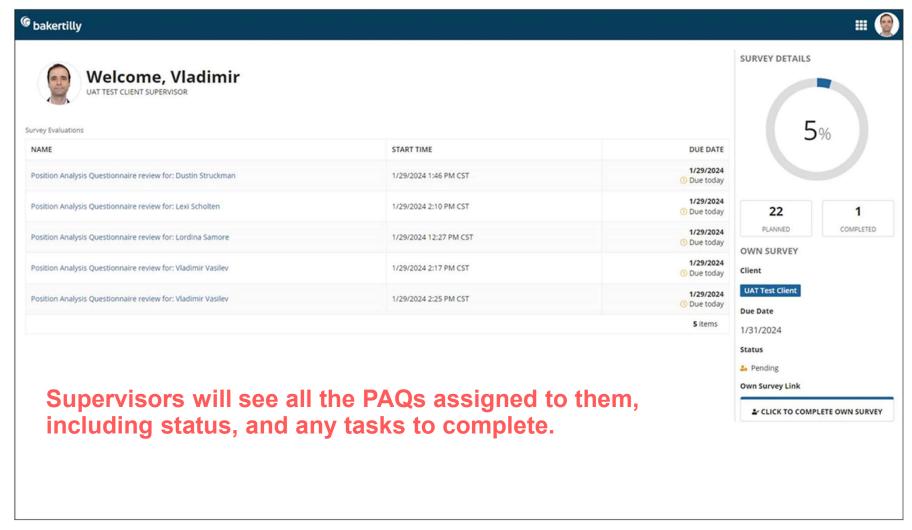




- 1. Click "Forgot your password?"
- 2. Enter your work email address as your username and click "Send Email"

- A temporary password will be sent to your email.
- Once you click the link and log-in with the temporary password, you can create a new password.
- Recommend writing your new <u>15 character</u> password down for safe keeping to log in later.





Less than High School Diploma or GED	
High School Diploma or GED	
Associates Degree	
Bachelors degree	
Masters degree	
● PhD	
14. Required Degree Major or Coursework	
test	
Supervisor Comment	
Supervisors can provide comments but cann change the employees original response.	
	ot 0/255
change the employees original response.	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience  Less than one year (minmal)	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience  Less than one year (minmal)  One to three years (moderate)	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience  Less than one year (minmal)  One to three years (moderate)  Three through five years (considerable)	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience  Less than one year (minmal)  One to three years (moderate)  Three through five years (considerable)  Six or more years (extensive)	
change the employees original response.  15. Please indicate the minimum experience level required to complete the normal, day-to-day tasks of this position  No Experience  Less than one year (minmal)  One to three years (moderate)  Three through five years (considerable)  Six or more years (extensive)	
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