State of Wisconsin

OFFICE OF STATE EMPLOYMENT RELATIONS

DIVISION OF MERIT RECRUITMENT AND SELECTION BULLETIN

Date:	October 12, 2006	**Subject:**	Personnel Management Classification Survey Program for 2006 and 2007
Locator No:	OSER-0142-MRS		

The purpose of this bulletin is to inform state agencies of the Office of State Employment Relations' (OSER) intention to conduct personnel management surveys of select occupational areas. The survey program is limited to occupational areas experiencing the most significant classification plan administration, recruitment and retention problems. OSER solicited survey requests from state agencies and prioritized those requests based on the justifications provided by the agencies as well as OSER's internal assessment. This limited-scope survey program recognizes the limited staff resources within OSER and the significant workload burden surveys place on state agency human resources and program staff.

One of the primary goals of the surveys listed in this bulletin is to simplify the classification structure. Simplification may occur as a result of consolidating similar titles, eliminating unnecessary levels within classification series, converting existing classification structures to accommodate unique compensation structures. Another primary goal is to ensure the classification specifications accurately reflect the work performed and the tools used to perform the tasks assigned to positions in these classifications.

The Division of Merit Recruitment and Selection (DMRS) will coordinate with the Division of Compensation and Labor Relations (DCLR) to complete the labor market surveys and propose the pay range assignments connected with these occupational surveys in order to prepare for negotiation of the 2007-2009 labor agreements.

Each survey listed in this bulletin will be managed by OSER, although some agencies will be taking the lead in conducting the actual review. This bulletin is intended to serve as formal notice announcing all of the personnel management surveys being undertaken at this time. No individual survey bulletins will be published.

Surveys will be conducted using the whole job methodology, using position descriptions (PDs) and information gathered during in-person interviews (i.e., audits) to assess the work. It cannot be stressed enough how important it is to have accurate PDs for this review. Hiring supervisors should be notified immediately of the survey plan and the need for accurate PDs. A timeline should be established to have those submitted to human resources. It has been demonstrated repeatedly that ensuring accurate, up-to-date PDs results in more accurate classification decisions that translates into fewer potential appeals and less time and effort spent in the appeal process. In addition, maintaining accurate PDs helps supervisors communicate job expectations, provides employees with the basic information they need to perform their duties and ensures more accurate classification decision-making.

Agency Involvement

Assistance and input from the relevant agencies will be crucial throughout the survey process. The OSER Survey Managers will conduct regular, periodic meetings with all Agency Survey Coordinators throughout the survey cycle to discuss progress, problem solve and coordinate the survey activities on a statewide basis. OSER Survey Managers will meet individually with Agency Survey Coordinators as needed and are available to serve as consultants to Agency Survey Coordinators who are taking the lead in some of the survey activity. Agency Survey Coordinators are strongly encouraged to actively participate in the audit process for those surveys being conducted by OSER in order to obtain the same information about the work that the OSER Survey Manager obtains. Agency Survey Coordinators should establish a communication plan to ensure timely and thorough information distribution within their own agency as appropriate.

In some cases, agency staff will be taking the lead in conducting the classification surveys and should involve the OSER Survey Manager in a representative sample of the position audits. Furthermore, Agency Survey

Coordinators are encouraged to coordinate their activities with representatives from the various affected employing units and to communicate often with the affected employees.

Additional information and guidance on the role of the Agency Survey Coordinator is available in *Wisconsin Human Resources Handbook* Chapter 450—Conducting or Assisting with a Personnel Management Survey.

Process

At this time, OSER is asking that agencies compile the following information and provide it to the OSER staff person identified on the chart below, who will function as the Survey Manager.

1. Identify an Agency Survey Coordinator and provide OSER with the coordinator's name, inter-departmental mailing address, e-mail address, and phone number. **Please provide this information to the OSER Survey Manager by October 27, 2006.** The OSER Survey manager will periodically convene meetings of the Agency Survey Coordinators to discuss the survey.

2. Identify any classification problems your agency has been experiencing with the classifications identified for inclusion in this survey. (See Attachment A.) The OSER Bureau of Compensation will collect problem identification data pertaining to recruitment, retention or other compensation-related information in a separate process. **Please send the problem identification information to the OSER Survey Manager by November 13, 2006.**

3. Submit a list of benchmark and/or unique positions recommended for audit and include the position description and organization chart for each position recommended for audit. A general rule of thumb is to audit approximately 10 percent of the positions included in the survey. If current PDs are accurate and complete, new PDs do not need to be developed. A review of submitted, up-to-date PDs is expected before they are sent to OSER. In lieu of that, the employee and the supervisor should initial and date the PD to document that it is accurate and complete. **Please send the list of benchmark and/or unique positions, copies of up-to-date positions descriptions, <u>and</u> organizational charts for each benchmark position to the OSER Survey Manager by November 30, 2006.**

4. The majority of position audits are likely to occur during January 2007.

5. Survey completion is targeted for the spring of 2007 in order to communicate survey results to bargaining unit representatives, as appropriate, during the 2007-2009 contract negotiations. (Refer to Attachment B for highlights of the workplan.)

Survey Timelines

Attachment B of this bulletin reflects the overall timeline for completion of these surveys. OSER's ability to adhere to this timeline is strongly dependent on the timely cooperation and assistance provided by agencies. This rather aggressive timeline is necessary in order to complete the surveys in time to share the results with the affected bargaining units, as appropriate, in order to negotiate the assignment of the pay ranges during negotiation of the 2007-2009 labor agreements for any new represented classifications that may be created as a result of these surveys.

Some specific survey activities may deviate from the attached timeline based on complexity of the occupational review. The OSER Survey Manager will communicate any timeline adjustments necessary for specific surveys. For example, as time allows, audits could begin sooner than January 2007, however, all survey activity must be completed in the spring of 2007.

Questions regarding the overall survey plan should be directed to Leean White via e-mail at Leean.White@Wisconsin.gov or by phone at (608) 267-0344. Questions regarding specific survey activities should be directed to the designated OSER Survey Manager.

Survey Name	OSER Survey Manager	Contact Information
Boiler & Elevator Safety Inspectors	Stephen Hermosillo*	(608) 266-0714 Stephen.Hermosillo@Wisconsin.gov
Education Professionals	Kris Chilsen*	(608) 266-7569 Kris.Chilsen@Wisconsin.gov
Human Resources Professionals	Tori Pettaway	(608) 266-8434 Toriana.Pettaway@Wisconsin.gov
Instrument Makers	Dean Paynter	(608) 266-1014 Dean.Paynter@Wisconsin.gov
Student Status Examiners	Dean Paynter*	(608) 266-1014 Dean Paynter@Wisconsin.gov
Program & Planning Professionals	Tammy Haack	(608) 266-8232 Tammy.Haack@Wisconsin.gov
Teacher Assistants	Patty Almond/Liz Pedretti**	(608) 266-1499 Patty.Almond@Wisconsin.gov
Victim Services Specialists	Leean White	(608) 267-0344 Leean.White@Wisconsin.gov

*OSER will oversee the survey as most steps of the survey process are conducted by agency representatives.
** Student Intern

Boiler and Elevator Safety Inspectors

These positions are located exclusively within the Department of Commerce, and the majority of the work associated with this classification survey will be completed by human resources staff within the Department of Commerce. The classification specifications are outdated and some of the existing levels within the series are no longer used. Simplification of the existing classification structure will be explored. OSER will oversee the survey activity and present survey results to the affected bargaining unit if necessary.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
BOILER SAFETY INSPR 1	73001	5	14	0
BOILER SAFETY INSPR 2	73002	5	15	0
BOILER SAFETY INSPR 3	73003	5	16	6
ELEVATOR SAFETY INSPR 1	73021	5	14	0
ELEVATOR SAFETY INSPR 2	73022	5	15	0
ELEVATOR SAFETY INSPR 3	73023	5	16	4
TOTAL				10

Education Professionals

Agencies with filled positions in this survey include the Department of Public Instruction, the Wisconsin Technical College System Board, the Wisconsin Historical Society, the Department of Justice, the Department of Workforce Development and the Department of Veterans Affairs. The Department of Public Instruction employs the vast majority of employees occupying positions in these classifications and will take the lead in performing the survey. Simplification of the classification structure will be explored. OSER will oversee the DPI's conduct of the survey and will coordinate the review with the remainder of the agencies affected by this survey.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
EDUCATION CONSULTANT	59480	13	4	102
EDUCATION CONSULTANT COORDINATOR	59360	13	4	3
EDUCATION PROGRAM COORDINATOR	59300	13	3	2
EDUCATION PROGRAM SPECIALIST	59960	13	3	10
EDUCATION SPECIALIST	59900	13	2	40
SCHOOL ADMINISTRATION CONSULTANT	59490	13	4	31
EDUCATION ADMINISTRATIVE DIRECTOR	59540	81	1	22
PUBLIC INSTRUCTION SUPERVISOR	59520	81	3	3
TOTAL				213

Instrument Makers

OSER agreed to perform a classification survey of the Instrument Makers in state service to determine if the classification structure meets the needs of the employer and to update the specifications if necessary to do so. OSER will conduct the review of these positions that are located exclusively within the UW System. Simplification of the classification structure will be explored.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
INSTRUMENT MAKER-ADV	83403	6	16	24
INSTRUMENT MAKER-ENTRY	83401	6	13	3
INSTRUMENT MAKER-JOURNEY	83402	6	15	21
INSTRUMENT SHOP COORDINATOR	83410	6	16	5
INSTRUMENT SHOP SUPERVISOR	83460	81	3	2
TOTAL				56

Program and Planning Analysts

These classifications are currently used by the Department of Agriculture, Trade and Consumer Protection, the Department of Commerce, the Office of the Commissioner of Insurance, the Public Service Commission, the University of Wisconsin System, the Wisconsin Technical College System Board, the Department of Natural Resources, the Department of Transportation, the Department of Corrections, the Department of Health and Family Services, the Department of Workforce Development, the Department of Justice, the Department of Veterans Affairs, the Department of Administration and the Department of Revenue. A team of OSER human resources professionals will conduct the review of these positions in order to determine if the current classification structure meets state agency needs and to explore the possibility of classification simplification.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
PROGRAM AND PLANNING ANALYST	09461	7	5	4
PROGRAM AND PLANNING ANALYST-ADV	09463	7	3	242
PROGRAM AND PLANNING ANALYST-SEN	09462	7	4	76
PROGRAM & PLANNING ANAL-ADV MGT	09440	81	3	13
PROGRAM & PLANNING ANAL-ADV SUPV	09420	81	3	14

PROGRAM & PLANNING ANAL-ADV CONF	09410	81	3	7
PLANNING & ANALYSIS ADMINISTRATOR	09460	81	2	26
PLANNING & ANALYSIS MANAGER	09450	81	1	4
TOTAL				386

Student Status Examiners

UW System will conduct a review of these positions used exclusively within the University of Wisconsin System with OSER's oversight. The purpose of the review is to update the classification specifications to accurately reflect the work performed and determine if there is an ongoing need for a multiple-level series. The existing classification specifications were created in 1979.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
STUDENT STATUS EXAMINER 1	19811	2	10	33
STUDENT STATUS EXAMINER 2	19812	2	11	76
TOTAL				109

Teacher Assistants

OSER will conduct a review of these positions located in the Department of Public Instruction, the University of Wisconsin System, the Department of Corrections and the Department of Health and Family Services. The purpose of the review is to update the classification specifications to accurately reflect the work assigned to positions in this classification. The current classification specification was developed in 1975.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
TEACHER ASSISTANT	58050	6	9	43
TOTAL				43

Victim Services Specialists

These positions are located within the Department of Corrections and the Department of Justice. This classification review is being conducted to assess whether the multiple-level series should be consolidated into a single level or redefined to allow for progression from the 1 to the 2 level within the existing series.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
VICTIM SERVICES SPECIALIST 1	53901	12	5	4
VICTIM SERVICES SPECIALIST 2	53902	12	7	1
TOTAL				5

Human Resources Professionals

In addition to the formal surveys identified above, OSER is exploring the possibility of simplifying the classification structure used to classify professional level positions used by state agencies other than OSER in the field of human resources.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
HUMAN RESOURCES COORDINATOR	10110	81	4	10
HUMAN RESOURCES SPECIALIST	10802	81	4	9
INSTITUTION HUMAN RESOURCES DIR	11010	81	4	5
UW HUMAN RESOURCES MANAGER	10910	81	4	32
CORRECTIONS HUMAN RESOURCES COORD	49610	81	3	1
HUMAN RESOURCES SPECIALIST-ADV	10804	81	3	9
HUMAN RESOURCES SPECIALIST-SENIOR	10803	81	3	52
INSTITUTION HUMAN RESOURCES DIR-AD	11110	81	3	19
NAT RES HUMAN RESOURCES MANAGER	10310	81	3	5
UW HUMAN RESOURCES MANAGER-ADV	11310	81	3	17
TOTAL				159

Patricia M. Almond

Patricia M. Almond, Administrator
Division of Merit Recruitment and Selection

Attachment A

PERSONNEL MANGEMENT SURVEYS

Problem Identification Guidelines

Personnel Management Surveys are conducted to resolve problems that occur in the area of Classification. The OSER Bureau of Compensation collects problem identification pertaining to recruitment, retention, and other compensation-related information in a separate process. To help us in the classification survey process, agencies are asked to assess whether problems are occurring in their agency in the areas noted below.

Please note that the list below is not all inclusive. Feel free to describe other problems your agency may be experiencing in utilizing the classifications under review in these surveys.

Identify all problems you are experiencing with any aspects of the current classification structure. Examples of specific problems within this broad area may include:

1. Changes in the technology, organization, occupation, equipment, statutory authority, etc., that are not described in the existing classification specifications.

2. The lack of identification of duties and responsibilities and position types or specializations in the existing classification specifications.

3. The inability to make clear distinctions between class levels or class series based on the existing classification specification definitions.

4. The presence of inequitable or inappropriate pay range alignments between positions in the same occupational area being reviewed (i.e., internal equity).

5. Insufficient classification series or levels to identify distinctly different kinds of work.

6. Concerns regarding assignment to the appropriate occupational area/bargaining unit.

Attachment B

2006-2007 Personnel Management Survey Program Timeline

Survey Phase	Task	Responsible Parties	Timeline
Problem Identification	Identify classification problems.	Agency Survey Coordinator	October 2006
Identify Included/Excluded Positions	Compile benchmark and unique position descriptions. Provide copies of PDs to OSER Survey Manager.	Agency Survey Coordinator	October 2006
Compensation Survey	Identify benchmark labor market comparison positions. Recommend public and private sector employers for Bureau of Compensation to contact for labor market comparison wage data.	OSER Survey Manager with input from Agency Survey Coordinator	November 2006 – March 2007
Position Audits	Identify benchmark and unique positions to audit. Develop audit questions. Conduct field, telephone and desk audits. Review audit results with agencies.	OSER Survey Manager and Agency Survey Coordinator	January 2007
Draft Classification Specifications	Discuss class concept proposals with agencies. Draft, review and revise specifications with agencies. Recommend pay range assignments in conjunction with Bureau of Compensation.	OSER Survey Manager	February 2007
Survey Implementation	Present survey findings to bargaining unit representatives as appropriate and provide rationale for proposed pay range assignments, as needed. Compare PDs of included positions to new specifications to determine appropriate classification. Draft OSER bulletin for survey implementation. Coordinate automated reallocation process with DOA Central Payroll and UW Payroll or prepare manual reallocations.	OSER Survey Manager	Date to be determined by OSER
Post Implementation	Participate in case preparation as needed. Serve as expert witness.	OSER Survey Manager with Agency Survey Coordinators as needed.	July – December 2007