State of Wisconsin

OFFICE OF STATE EMPLOYMENT RELATIONS

DIVISION OF MERIT RECRUITMENT AND SELECTION BULLETIN

Date:	August 13, 2008	**Subject:**	Personnel Management Classification Survey Program for FY 2007-2009—Announcement of Scope and Schedule
Locator No:	OSER-0217-MRS		

The purpose of this bulletin is to follow up Bulletin OSER-0186-MRS, Personnel Management Classification Survey Program for FY 2007-2009, (dated April 28, 2008) which was the formal solicitation of classification and compensation needs. Following the submission of agency problem identification and requests for survey, the Office of State Employment Relations (OSER) has identified the scope of occupational areas and the schedule to complete surveys by spring of 2009. 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 2009-2011 collective bargaining agreements.

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 including union input. 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.

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 of the personnel management surveys being undertaken at this time. No individual survey bulletins will be published.

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 Agency Survey Coordinators throughout the survey cycle to discuss progress, solve problems 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 take the lead in some of the survey activity. Agency Survey Coordinators are strongly encouraged to participate actively in the audit process in those surveys being conducted by OSER 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 agencies 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

Surveys will be conducted using the whole-job methodology, using position descriptions (PDs) and information gathered during in-person 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 and 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, translating 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.

At this time, OSER requests that agencies complete the following activities as directed. The OSER staff person who will function as the Survey Manager for each survey are identified on the chart below.

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 August 22, 2008.** The OSER Survey Manager will periodically convene meetings of the Agency Survey Coordinator(s) 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 problem identification may be reiteration of information provided in response to OSER-0186-MRS, or it may be new, additional information. 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 classification problem identification information to the OSER Survey Manager by August 30, 2008.**

3. Ensure that positions included in the surveys have updated PDs. This includes completion of the Certification Form. (See Attachment C.) 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, and copies of all benchmark positions descriptions with organizational charts to the OSER Survey Manager by September 12, 2008.**

Survey Timelines

It is critical for all stakeholders to support the workplan activities and schedule goals reflected in the overall timeline for completion of these surveys. (See Attachment B.) 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 to complete the surveys in time to share the results with the affected bargaining units, as appropriate, and to negotiate the assignment of the pay ranges during negotiation of the 2009-2011 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. However all survey activity must be completed in the spring of 2009.

Questions regarding the overall survey plan should be directed to Linda Brennan via e-mail at Linda.Brennan@wisconsin.gov or by phone at (608) 267-0408. Questions regarding specific survey activities should be directed to the designated OSER Survey Manager.

Survey Organization

Survey Name	OSER Survey Manager	Contact Information
Animal Health Regulators*	Pat Waterman*	(608) 266-8149 Pat.Waterman@Wisconsin.gov
Archivists	Shari Nevel	(608) 266-7569 Shari.Nevel@Wisconsin.gov
Curators	Shari Nevel	(608) 266-7569 Shari.Nevel@Wisconsin.gov
Librarian	Shari Nevel	(608) 266-7569 Shari.Nevel@Wisconsin.gov
Locksmith	Dean Paynter	(608) 266-1014 Dean.Paynter@Wisconsin.gov
Trust Funds Assistant*	Scott DuBenske*	(608) 266-2705 Scott.DuBenske@Wisconsin.gov

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

Animal Health Regulators

These positions are located exclusively within the Department of Agriculture, Trade and Consumer Protection (DATCP) and the majority of the work associated with this classification survey will be completed by human resources staff within DATCP. The classification specifications are outdated and there is some difficulty in distinguishing between the existing levels within the series. 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
ANIMAL HEALTH CONSULTANT	70270	5	15	4
ANIMAL HEALTH INSPECTOR-ENTRY	70261	5	13	0
ANIMAL HEALTH INSPECTOR-OBJ	70262	5	14	8
TOTAL				12

Archivists

Agencies with filled positions in this survey include the Department of Veterans Affairs (1), University of Wisconsin – Madison (1), and the Wisconsin Historical Society (12). The classification specifications are outdated and vacancies are hard to fill.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
ARCHIVIST	57200	13	1	14

Curators

Agencies with filled positions in this survey include the Department of Veterans Affairs (4) and the Wisconsin Historical Society (12). The classification specifications are outdated and vacancies are hard to fill.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
CURATOR	63200	13	1	16

Librarians

Agencies with filled positions in this survey include the Department of Children and Families (1), Department of Corrections (20), Department of Employee Trust Funds (1), Department of Health Services (3), Department of Justice (1), Department of Public Instruction (8), Office of the Treasurer (1), University of Wisconsin – Madison (11), and Wisconsin Historical Society (8). The classification specifications are outdated and vacancies are hard to fill.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
LIBRARIAN	57800	13	1	55

Locksmiths

These classifications are currently used by the Department of Administration (1), Department of Corrections (2), Department of Health Services (4), Department of Veterans Affairs (1) and the University of Wisconsin – Madison (19). The classification specifications are outdated.

Classification Title	Class Code	Pay Schedule	Pay Range	Employee Count
LOCKSMITH-ENTRY	91301	3	10	2
LOCKSMITH-JOURNEY	91302	3	11	25
TOTAL				27

Trust Funds Assistants

These positions are located exclusively within the Department of Employee Trust Funds (ETF), and the majority of the work associated with this classification survey will be completed by human resources staff within ETF. The classification specifications are outdated, there are new programmatic complexities, and there is some difficulty in distinguishing between the Trust Funds Assistants and Trust Funds Specialists series. 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
TRUST FUNDS ASSISTANT 1	19921	2	11	3
TRUST FUNDS ASSISTANT 2	19922	2	12	11
TRUST FUNDS ASSISTANT 3	19923	2	13	26
TOTAL				40

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.

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 inequity).

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

FY 2007-2009 Personnel Management Survey Program Timeline

Survey Phase	Task	Responsible Parties	Timeline
Problem identification	Identify classification problems.	Agency Survey Coordinator	August 2008
Identify included/excluded positions	Compile benchmark and unique position descriptions. Provide copies of PDs to OSER Survey Manager.	Agency Survey Coordinator	August - September 2008
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	September – December 2008
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	September – October 2008
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	October 2008 – February 2009
Inclusion in contract negotiations and survey implementation plan	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	Dates to coincide with 2009 – 2011 contract negotiations
Post implementation	Participate in appeals case preparation as needed. Serve as expert witness.	OSER Survey Manager with Agency Survey Coordinators as needed.	Appeals timeline following implementation

Attachment C

_____
(class/family title)

CLASSIFICATION SURVEY
Position Description Certification Statement

EMPLOYEE

I am aware that my position is included in the _____ classification survey and that position descriptions for positions included in this survey are to be updated to reflect current responsibilities. I also understand that my position will be allocated in the survey based on this current position description.

I have examined the attached position description dated (insert date) _____ and agree that the position description and its duties, goal statements, and percentages assigned, knowledge, skills and abilities, and organizational chart are current and accurate.

(NOTE: The percentages for the goals should add up to 100 percent. If possible, an estimate of the percentage of time spent on each worker activity should be listed, particularly for worker activities which constitute 10 percent or more of the total workload.)

If you agree with the above statements, please sign below.

_____ _____
Employee Signature **Date**

SUPERVISOR

I am aware that this position is included in the _____ classification survey and that position descriptions for positions included in this survey are to be updated to reflect current responsibilities. I also understand that positions in the survey will be allocated based on the current position descriptions.

I have examined the attached position description dated (insert date) _____ and agree that the position description and its duties, goal statements, and percentages assigned, knowledge, skills and abilities, and organizational chart are current and accurate.

(NOTE: The percentages for the goals should add up to 100 percent. If possible, an estimate of the percentage of time spent on each worker activity should be listed, particularly for worker activities which constitute 10 percent or more of the total workload.)

If you agree with the above statements, please sign below.

_____ _____
Supervisor Signature **Date**

*Provide completed forms and position descriptions with organizational charts to the appropriate Agency Survey Coordinator.