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Personnel Welfare Committee presentation to President's Compensation Committee meeting Spring 2006

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Notes

1. Colored Ink
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ADMINISTRATIVE STAFF COMPENSATION SPRING 2006

A. Performance-Based Merit System – BOT Resolution #57-97
NO LONGER FUNCTIONS

B. Mercer, Inc. Performance/Penetration Matrix
REQUIRES FUNCTIONAL PERFORMANCE-BASED MERIT
SYSTEM

C. How do we make it work?

1. mandate from the President
2. support from VPs
3. cooperation between HR, Provost, ASC
 - a) approval of process: unit-level merit criteria, goal-setting, mid-year and year-end performance reviews conducted between supervisors/employees
 - b) letters to appropriate VP, supervisor, employee when no paperwork is filed by deadline
 - c) supervisor does not meet expectations if evaluations are not completed, employee automatically receives merit increase (faculty whose PT documents are not addressed in the 7 year timeframe are automatically awarded tenure or promotion)

D WHY

- productivity — accountability to tax payers/voters
- State - support for funding of higher ed when we are evaluated on performance
- classified faculty

Timeline —

cover lot of staff whose evaluations are within

2

In June 1997 the Board of Trustees approved resolution 57-97, **Principles and Recommendations for a Performance-Based Merit System for Administrative Staff**. This plan, which also appears in the Administrative Staff Handbook, was developed to be equitable and to reward performance that exceeded expectations. A performance evaluation document for all administrative staff was distributed and performance appraisal training was provided for all administrative staff and supervisors of administrative staff.

A Handbook of Commonly Shared Employment Policies for BGSU Faculty, Administrative and Classified Staff states: "All employees at BGSU are expected to participate in annual performance reviews. Because evaluations provide for a systematic review and evaluation of the work of each employee, they are to be conducted on an annual basis regardless of whether or not merit dollars are available."

Despite all of these policies being in place, the system has not functioned for years. Many administrative staff are not evaluated annually, have no process for goal setting, mid-year review or understanding allocation of merit in years when the salary increase is greater than 3%.

In January 2006 Administrative Staff Executive Committee and Personnel Welfare Committee met with representatives from Mercer, Inc. to discuss the compensation plan. A perennial problem for administrative staff is movement through the pay grade in a reasonable period of time. One of the Mercer power point slides illustrates an equitable solution to this problem based upon performance. However, this method cannot be implemented with the currently dysfunctional performance appraisal system.

In order for the performance-based merit system to work, all administrative staff and supervisors of administrative staff must be made accountable to fully participate. Neither HR, nor the Provost alone can enforce the system. Mandate for full implementation of this system must come from the President. Administrative Staff Council is willing to partner with HR and the Provost to make the system work.

The 1997 performance appraisal form was "cumbersome" and did not address the work of all areas. Currently functioning appraisal systems are used in Finance and Administration and University Libraries and possibly in other areas as well, illustrating that the documents do not have to be uniform.

"Annual evaluations of administrative staff ought not to be an option. They should be required. We need to develop a form very quickly so that we can see to it that the evaluation itself is designed to address such matters as career development, job performance, etc. These evaluations, in my judgment, should be reviewed by the supervisors of the supervisors. They should be used as part of the annual evaluation of supervisory personnel with regard to their effectiveness in their positions." – Charles R. Middleton, August 1996

Draft of Goals to be submitted to President's Compensation Committee

Issue:
Performance-Based Merit System

Justification:
A performance-based merit system for awarding employee salary increases would be endorsed by Administrative Staff Council if such a system is fair, equitable, and uniformly implemented across campus.

Goal: Fully implement *Principles and Recommendations for a Performance-Based Merit System for Administrative Staff* - No. 57-97, approved by the Board of Trustees in 1997.

Issue:
Attainment of the mid-point of their salary range for administrative staff within five to seven years of employment.

Justification:
The Mercer group has suggested that five to seven years is a reasonable time for administrative staff to reach the mid-point of their salary range. Further, they suggest that a normal distribution is desirable. The current system, however, has a flat distribution with comparable number at the minimum, first, second and third quartiles, and even 9% of administrative staff above the maximum level of their range.

Goal:
Design and implement a compensation plan that moves administrative staff through their salary range in a timely fashion. If an effective evaluation system is fully implemented, such a plan could be the *Performance/Penetration Matrix* outlined in the recent *Mercer Compensation program Review*. Other options include a fixed salary increase or a combination fixed and percentage increase as outlined in the attached documentation.

Issue:
Salary increases

Justification:
Consistent with the University's goals, faculty salaries have increased at a faster pace than administrative and classified staff over that past six years. During that time period, faculty have seen increases averaging 4% while administrative staff salaries have increased by only 3%. Add to that the 4.3% increase in summer instruction compensation, faculty increases have far outweighed those for other University employees. Recognizing the need to make faculty salaries more competitive with other institutions, that differentiation may have been necessary for a period of time. Now the

need to increase the sense of community and enhance collaboration between constituent groups outweighs the need to further increase the competitiveness of faculty salaries.

Goal:
Make salary increases consistent across constituent groups.

Issue:
Accrued Vacation Time

Justification:
University administrative staff are losing vacation at the rate of thousands of hours each year. Classified staff with 20 or more years of service are allowed to accumulate 480 hours of vacation. To create an equitable system, administrative staff should also be able to accrue 480 hours. By replacing vacant administrative staff positions, current staff would have the opportunity to utilize the vacation time earned.

Goal:
Increase vacation accrual maximum to 480 hours (60 days) The increase would only be available to Administrative Staff members while employed at the University. Monetary payment would NOT be made at retirement.

Issue:
Personal Leave

Justification:
[a] The additional work responsibilities absorbed and productivity achieved by administrative staff due to tightened budget constraints, deserves recognition and reward. Time away from the workday will enhance morale and ultimately, productivity, since the work will still have to be completed.
[b] New staff have no leave accumulated and are often most in need of time off due to the transition process. They have a need for leave during normal business hours to assist in that transition process.

Deleted: deserve
Deleted: productivity
Deleted: work day

Goal:
[a] Provide a minimum of eight hours of personal leave for all university staff who have provided satisfactory performance indicating they are meeting their job expectations.
Goal [b] Grant eight hours of personal leave to new employees, to be used during their first year of employment at BGSU

Issue:
Scheduling Flexibility

Justification:

Administrative staff are expected to work the hours necessary to complete their professional duties, which may sometimes require more than 40 hours per week. Administrative staff, who do work more than forty hours per week, should be allowed to earn compensatory time, that can be utilized by the implementation of flexibility in the scheduling of their work hours.

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Goal:

Provide a clear statement in the ASC Handbook, of hours to be worked by administrative staff and a process to define how flexible scheduling can be utilized when departmental needs require perpetual/consistent work of more than 40 hours per week.

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Issue:

Interim/Acting Positions

Justification:

During tight budget times, vacant positions are not always immediately filled. As a result, current employees often take on added responsibilities. When these additional duties include temporary or interim duties, they are added in addition to the previous duties the employee was performing. The original recommendation from a University consultant was to increase the salary by 10% in the above circumstances. The university chose to decrease that amount to the current 5% minimum increase. Two goals are impacted by the consultant's report.

Deleted: Administrative are adding additional duties to their responsibilities so we continue to expect more from each position

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Deleted: use

Deleted: It is time to implement the 10% to properly reflect the employees' contributions.

Goal:

Increase minimum salary increase for interim and acting positions to 10%; make the increase permanent if position is held for one year.

Goal:

Increase salary adjustment to 10% for JAO review results which move the employee to a higher pay grade.

Issue:

Summer Hours

Justification:

Under the current system, individual units determine hour summer work schedules will be implemented. This inconsistency can cause morale issues across campus.

Goal:

Develop guidelines for consistency in summer hours work schedule. Although the University may need to remain open 8-5 Monday through Friday, individuals could still be allowed to leave early on Friday or come in late on Monday through the use of flexible scheduling.

They are an addition to the employee's ~~own~~ ongoing job duties

LONG TERM GOALS

Provide health care benefits for part time administrative staff

The University is to be complemented on its continued attempts to maintain the level and quality of medical coverage. Given the increasing cost of health care, this is truly commendable. Extending the coverage to part-time administrative staff, on a pro-rated basis, could enhance this effort. Given the relatively low number of such staff members (21), the cost would be within reason.

Encourage supervisors to communicate vacation accruals balance and potential loss of hours to employees during the mid-year evaluation process so that the employee can avoid the loss.

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Deleted: to

Continue to work toward the implementation of a sick leave bank for employees to utilize when their personal sick leave is exhausted.

Continue to explore concepts of wellness programs to reduce health care costs.

Provide all administrative staff with a pay grade within twelve months of employment.

ASC Meeting , April 6 2006

Draft of Goals to be submitted to President's Compensation Committee

Issue:

Salary increases

Justification:

Consistent with the University's goals, faculty salaries have increased at a faster pace than administrative and classified staff over that past seven years. Approved Faculty Salary dollars have increased by 13.3 Million dollars while approved budget administrative staff dollars have increased by 6.7 million dollars. During that time period, faculty have seen increases averaging 4% while administrative staff salaries have increased by only 3%. Add to that the 4.3% increase in summer instruction compensation, faculty increases have far outweighed those for other University employees. While ASC recognized the need to make faculty salaries more competitive with other institutions, that differentiation may have been necessary for a period of time. Now the need to increase the sense of community and enhance collaboration between constituent groups outweighs the need to further increase the competitiveness of faculty salaries.

Goal:

Make salary increases consistent for all constituent groups at BGSU.

Issue:

Performance-Based Merit System

Justification:

A performance-based merit system for awarding employee salary increases would be endorsed by Administrative Staff Council if such a system is fair, equitable, and uniformly implemented across campus.

Goal: Fully implement *Principles and Recommendations for a Performance-Based Merit System for Administrative Staff* – No. 57-97, approved by the Board of Trustees in 1997.

Issue:

Attainment of the mid-point of their salary range for administrative staff within five to seven years of employment.

Justification:

The Mercer group has suggested that five to seven years is a reasonable time for administrative staff to reach the mid-point of their salary range. Further, they suggest that a normal distribution is desirable. The current system, however, has a flat distribution with comparable number at the minimum, first, second and third quartiles. The problem is further exacerbated by 9% of administrative staff above the maximum level of their range. This occurs much more frequently at the upper level pay ranges.

Goal:

Design and implement a compensation plan that moves administrative staff through their salary range in a timely fashion. If an effective evaluation system is fully implemented, such a plan could be the *Performance/Penetration Matrix* outlined in the recent *Mercer Compensation program Review*. Other options include a fixed salary increase or a combination fixed and percentage increase as outlined in the attached documentation.

Issue:
Accrued Vacation Time

Justification:
University administrative staff are losing vacation at the rate of thousands of hours each year. Classified staff with 20 or more years of service are allowed to accumulate 480 hours of vacation. To create an equitable system, administrative staff should also be able to accrue 480 hours. By replacing vacant administrative staff positions, current staff would have the opportunity to utilize the vacation time earned.

Goal:
Increase vacation accrual maximum to 480 hours (60 days). The increase would only be available to Administrative Staff members while employed at the University. ~~Monetary payment would NOT be made at retirement.~~

Issue:
Personal Leave

Justification:
[a] The additional work responsibilities absorbed and productivity achieved by administrative staff due to tightened budget constraints deserves recognition and reward. Time away from the workday will enhance morale and ultimately, productivity, since the work will still have to be completed.
[b] New staff have no leave accumulated and are often most in need of time off due to the transition process. They have a need for leave during normal business hours to assist in that transition process.

Goal:
[a] Provide a minimum of eight hours of personal leave for all university staff who have provided satisfactory performance indicating they are meeting their job expectations.
Goal [b] Grant eight hours of personal leave to new employees, to be used during their first year of employment at BGSU

Issue:
Scheduling Flexibility

Justification:
Administrative staff are expected to work the hours necessary to complete their professional duties, which may sometimes require more than 40 hours per week. Administrative staff, who do work more than forty hours per week, should be allowed to ~~utilize~~ flexibility in the scheduling of their work hours. Examples of flexible work hours might be "not being required to use ~~sick time~~ ^{leave} for a one hour medical appointment when working 10 hours that same day" or "being scheduled for one less work day during the week shortly after working seven full 10 hour days to meet seasonal programmatic needs"

attending your child's school play

Betsy Clark
Memo to admin - if you have to make summary

Goal:

Provide a clear statement in the ASC Handbook, of hours to be worked by administrative staff and a process to define how flexible scheduling can be utilized when departmental needs require perpetual/consistent work of more than 40 hours per week.

Issue:

Interim/Acting Positions

Justification:

During tight budget times, vacant positions are not always immediately filled. As a result, current employees often take on added responsibilities. These duties may include temporary or interim responsibilities that are simply added to existing duties the employee performs for their position. The original recommendation from the a University consultant was to increase the salary by 10% in the above circumstances. The university chose to use decrease that amount to the current 5% minimum increase. It is time to implement the 10% to properly reflect the employees' contributions. Two goals are impacted by the consultant's report

Goal:

Increase minimum salary increase for interim and acting positions to 10%; make the increase permanent if position is held for one year.

Goal:

Increase salary adjustment to 10% for JAQ review results which move the employee to a higher pay grade.

Issue:

Summer Hours

Justification:

Under the current system, individual units determine how summer work schedules will be implemented. This inconsistency can cause morale issues across campus.

Goal:

Develop guidelines for consistency in summer hours work schedule. Although the University may need to remain open 8-5 Monday through Friday, individuals could still be allowed to leave early on Friday or come in late on Monday through the use of flexible scheduling.

LONG TERM GOALS

Provide all administrative staff with a pay grade within twelve months of employment.

Provide health care benefits for part time administrative staff

The University is to be complemented on its continued attempts to maintain the level and quality of medical coverage. Given the increasing cost of health care, this is truly commendable. Extending the coverage to part-time administrative staff, on a pro-rated basis, could enhance this effort. Given the relatively low number of such staff members (21), the cost would be within reason.

Encourage supervisors to communicate vacation accruals balance and potential loss of hours to employees during the mid-year evaluation process so that the employee can avoid the loss.

Continue to work toward the implementation of a sick leave bank for employees to utilize when their personal sick leave is exhausted.

Continue to explore concepts of wellness programs to reduce health care costs.

Administrative Staff Council Compensation Goals for 2006-2007
April 12, 2006 – Presented to President's Compensation Panel

Issue 1:
Salary increases

Justification:

Consistent with the University's goals, faculty salaries have increased at a faster pace than administrative and classified staff over that past seven years. Approved Faculty salary dollars have increased by 13.3 million dollars while approved budget Administrative Staff dollars have increased by 6.7 million dollars. During that time period, faculty ranks have seen increases averaging 4% while administrative staff salaries have increased by only 3%. Add to that the 4.3% increase in summer instruction compensation, faculty increases have far outweighed those for other University employees. Recognizing the need to make faculty salaries more competitive with other institutions, that differentiation may have been necessary for a period of time, now the need to increase the sense of community and enhance collaboration between constituent groups outweighs the need to further increase the competitiveness of faculty salaries. Continued disparity between faculty and administrative staff salary increases could create or further a divide affecting campus morale.

Goal:

Make salary increases consistent across constituent groups.

Issue 2:

Performance-Based Merit System

Justification:

A performance-based merit system for awarding employee salary increases would be endorsed by Administrative Staff Council if such a system is fair, equitable, and uniformly implemented across campus.

Goal: Fully implement *Principles and Recommendations for a Performance-Based Merit System for Administrative Staff* – No. 57-97, approved by the Board of Trustees in 1997.

Issue 3:

Mid-point of the salary range

Justification:

The Mercer group has suggested that five to seven years is a reasonable time for administrative staff to reach the mid-point of their salary range. Further, they suggest that a normal distribution is desirable. The current system, however, has a flat distribution with comparable number at the minimum, first, second and third quartiles. The problem is further exacerbated by 9% of administrative staff above the maximum level of their range. This occurs much more frequently at the upper level pay ranges.

Higher budget for faculty
much more faculty hiring

Response from
Elyse July

Compare our salaries to our peers at other institutions
in comparison to their faculty

Dobb: not feasible at this time vs: budget 12

Goal:

Design and implement a compensation plan that moves administrative staff through their salary range in a timely fashion. If an effective evaluation system is fully implemented, such a plan could be the *Performance/Penetration Matrix* outlined in the recent *Mercer Compensation program Review*. Other options include a fixed salary increase or a combination fixed and percentage increase as outlined in the attached documentation.

Issue 4:

Accrued Vacation Time

Dalton would drive up liability because these may use it

Justification:

University administrative staff loose vacation at the rate of thousands of hours each year. Classified employees who have 20 or more years of service are allowed to accumulate 480 hours of vacation. To create an equitable system, administrative staff should also be able to accrue 480 hours. By replacing vacant administrative staff positions, current staff would have the opportunity to utilize the vacation time earned.

Goal:

Increase vacation accrual maximum to 480 hours (60 days).

Issue 5:

Personal Leave

Justification:

The additional work responsibilities absorbed and productivity achieved by administrative staff due to tightened budget constraints deserves recognition and reward. Time away from the work day will enhance morale and ultimately productivity. New staff have not accumulated leave and are often most in need of time off due to the transition process. They have a need for leave during normal business hours to assist in that transition process.

Goal:

Provide a minimum of eight hours of personal leave, in addition to those hours accrued through non-abuse of sick leave, for all university administrative staff who have provided satisfactory performance indicating they are meeting their job expectations. Grant eight hours of personal leave to new employees, to be used during their first year of employment at BGSU

Done to Br. CC

IST Draft Statement

use of Flexible Scheduling →

13

to replace language in handbook
to give Admin staff something to take
to supervisor to get Max time

Issue 6:
Scheduling Flexibility

Justification:

Administrative staff members are expected to work the hours necessary to complete their professional duties, which may sometimes require more than 40 hours per week. Administrative staff, working more than forty hours per week, should be allowed to use flexibility in the scheduling of their work hours. Examples might include not being required to use personal leave to attend a child's school conference when working 10 hours that same day or being scheduled for one less work day during the week shortly after working seven full 10-hour days to meet seasonal programmatic needs.

Goal:

Provide a clear statement in the Administrative Staff Handbook, of hours to be worked by administrative staff and a process to define how flexible scheduling can be utilized when departmental needs require perpetual/consistent work of more than 40 hours per week.

Issue 7:
Interim/Acting Positions

draft is 80%

Justification:

During tight budget times, vacant positions are not always immediately filled. As a result, current employees often take on added responsibilities. These duties may include temporary or interim responsibilities that are simply added to existing duties the employee performs for their position. The original recommendation from the University consultant was to increase the salary by a minimum 10% in the above circumstances. The university chose to decrease that amount to the current 5% minimum increase. It is time to implement the minimum 10% increase to properly reflect the employees' contributions. Two goals are impacted by the consultant's report

Goal:

Increase minimum salary increase for interim and acting positions to 10%; make the increase permanent if position is held for one year.

Goal

Increase salary adjustment to 10% for JAQ review results which move the employee to a higher pay grade.

LONG TERM GOALS

Encourage supervisors to communicate vacation accrual balance and potential loss of hours to employees during the mid-year evaluation process so that the employee can avoid the loss.

Continue to work toward the implementation of a sick leave bank for employees to utilize when personal sick leave is exhausted.

Continue to explore concepts of wellness programs to reduce health care costs.

Provide health care benefits for part time administrative staff

The University is to be complemented on its continued attempts to maintain the level and quality of medical coverage. Given the increasing cost of health care, this is truly commendable. Extending the coverage to part-time administrative staff, on a pro-rated basis, could enhance this effort. Given the relatively low number of such staff members (21), the cost would be within reason.