**2007 Processes for Reclassification and Market Equity Adjustments for Staff Employees - PowerPoint Presentation**

***Reclassification***

**Classification of Library Assistant and Library Associate Positions**

* Coinciding with the implementation of the University’s Performance Management Initiative in March 2006 the Library HR Office began requesting that all staff Position Descriptions (PD’s) be reviewed, updated and submitted electronically.
* As part of the Reclassification project, the most current versions of these documents were made available online (<http://www.uflib.ufl.edu/HRPD/>) so that each position's duties could be reviewed and groups of positions could be easily compared within and outside units, departments and divisions.
* Each position’s duties, as detailed in the PD, were compared by the unit, department, and division to the [Classification Descriptions](http://library.ufl.edu/committees/SSRC/documents/LibraryAssistantandAssociateClassifications_000.doc) and [Examples of Duties](http://library.ufl.edu/committees/SSRC/documents/LibraryAssistantandAssociateExamples_000.doc) for each classification produced and submitted by the Staff Structure Reorganization Committee (see: [Full Committee Report](http://library.ufl.edu/committees/SSRC/documents/CommitteeReportandRecommendations_000.doc)).  Each position was mapped to the appropriate Library Assistant or Library Associate classification.  Positions that fell outside of the library-specific work of these classifications were handled as described below.
* The proposed mapping for each position was reviewed for appropriateness, equity and consistency by the subsequently higher levels of authority within the unit, department, and division.
* All mapping recommendations put forth by the divisions were reviewed by the Library Directors to ensure that positions were mapped equitably and consistently across the different divisions of the libraries.
* The results of the Reclassification process are depicted here:
  + [Current Titles Mapped to New Classifications](http://library.ufl.edu/committees/SSRC/CurrentvMappedTitles2_001.htm)
  + [Distribution of Positions Across Classifications](http://library.ufl.edu/committees/SSRC/DistributionofPositionsAcrossClassifications.htm)

Implementation of Reclassification

* **TEAMS.**  Positions occupied by current TEAMS employees and mapped to the new Library Assistant or Library Associate classifications will convert to the appropriate new classification.
* **USPS.**  Positions occupied by current USPS employees and mapped to the new Library Assistant or Library Associate classifications will convert to the appropriate new classification only if the incumbent voluntarily elects to convert to TEAMS.  The decision to convert to TEAMS and convert to the new classification will have no bearing on the eligibility for market equity adjustments for USPS employees.  Market equity adjustments for USPS employees will be implemented irrespective of that employee's decision to convert to TEAMS and, consequently, to the new classification.
* ***New positions and promotions.***  Future job vacancies for positions with primarily library-specific job duties will only be posted as Library Assistant and Library Associate positions.  Accordingly, acceptance of one of these positions will require the employee to have TEAMS status.

***Market Equity Reviews***

Leadership of the libraries seeks to equitably compensate library employees based upon

1. the relevant market statistics for salaries for their positions
2. the distribution of the following:
   * Level and scope of duties;
   * Complexity of work assignments;
   * Judgment, authority and decision making exercised;
   * Skills, Knowledge and Abilities required of the position; and
   * Autonomy
3. the incumbent's relative educational and professional credentials

**Library Assistants and Library Associates**

* Based upon market data from the 2006 ALA-APA Salary Survey and in conformance to generally accepted classification and compensation standards, UF Classification and Compensation determined the [target minimum, mean and maximum salaries](http://library.ufl.edu/committees/SSRC/LALAsUFClassandCompTargets.htm) for each of the new Library Assistant and Library Associate classifications.
* Relevant service and educational credentials were selected as compensable factors that would distinguish between the individual target salaries for employees whose positions were mapped to Library Assistant or Library Associate classifications.  Increasing years of relevant service and educational attainment would result in increased compensation and create the distribution of salaries relative to the targeted average for each of the classifications.
* Compensable factor data for each employee whose position was mapped to Library Assistant or Library Associate classifications was collected through the divisional and departmental leadership.  [Statistics for this data](http://library.ufl.edu/committees/SSRC/CompFactors.htm).
* The [relative weight](http://library.ufl.edu/committees/SSRC/Modifiers.htm) of the levels for both of the compensable factors was established. The average level of each compensable factor resulted in a weight of 1.0.  Levels above or below the average level for that compensable factor resulted in weightings of below or above 1.0.
* The compensable factors for each employee’s education and relevant professional experience were averaged to arrive at an overall compensable factor for that employee.  This overall compensable factor was applied to the targeted average salary for the classification to which the employee’s position was mapped.  [(Example)](http://library.ufl.edu/committees/SSRC/ExampleoftheApplicationofCompensableFactors.htm)  The resulting wage was the target wage for the employee and reflected the market for their duties and their relative educational and professional credentials.
* The resulting statistics for the application of this process to the 119 employees whose positions were mapped to the Library Assistant and Library Associate classifications are summarized [here](http://library.ufl.edu/committees/SSRC/TargetSalaryData.htm).
* As a result of the market equity review and application of the compensable factors, 104 of the 119 employees whose positions were mapped to Library Assistant or Library Associate classifications are subject to a salary increase in order to achieve the target salary for their position.

**Positions Other than Library Assistants and Library Associates**

* Campus market data was collected for the salaries of relevant classifications.  This data included UF and the Health Science Center.  (LINKS: [IT Positions](http://library.ufl.edu/committees/SSRC/ITCampus.htm) and [All Other Positions](http://library.ufl.edu/committees/SSRC/OthersCampus.htm)).

***IT Positions***

* + 12 positions (1 of which is vacant) within the Systems Department and 6 positions from various other units and departments were reviewed and determined to be primarily IT positions.
  + These positions were mapped into the appropriate IT classifications based upon the [UF classification descriptions](http://www.hr.ufl.edu/class_comp/classification/exempt/I.asp) and the current position descriptions.  The classifications for each of the Smathers IT positions was reviewed by UF Classification and Compensation and confirmed.
  + The Smathers IT employees were assigned over three UF IT classifications: IT Specialist, IT Expert, and IT SR.
  + The complexity of duties, responsibilities, and technical requirements of the positions assigned within each of the classifications was compared.  It was determined that there was sufficient distinction in these factors between the positions assigned to the IT Expert and IT SR classifications to require banding of those positions into salary steps.  These steps permitted internal equity between individual positions within these broad classifications based upon the level of the position's duties.  The target salaries for each classification and for the IT Expert and IT SR steps within those classifications was determined based upon internal and external (campus) equity.  The result was the Smathers IT structure depicted [here](http://library.ufl.edu/committees/SSRC/SmathersITDesign.htm).

***Non-IT Positions***

* + There 23 Non-IT positions occupied by library employees.
  + These positions were reviewed for internal equity and compared to salary data for other occupants of the same classifications from UF and the Health Science Center.  The campus median salaries for these classifications were established as the target salary for the occupants of these positions.
  + The result was that of these 23 positions, the current salaries of 16 fell below the median (or target) salaries for that classification and 7 positions had salaries at or above the market equity level for their classification.  Those whose current salaries fell below the median were targeted for increases.

**Results**

* 120 employees are targeted for market equity increases to their salaries.  This represents 80% of the Smathers Libraries staff employee population.
* The average target increase for those 120 employees is $5,441.57.
* The total recurring costs associated with the implementation of market equity adjustments fall into 2 categories:
  + Gross wages.  These are the difference between the targeted salaries and current salaries for those employees who are currently paid below their targets.
  + Fringe.  This marginal expense is the result of payroll taxes and insurance incurred by the employer for payroll increases.  These costs are at a factor of 18 percent, which means that every increase of $100.00 in wages results in an additional fringe cost of $18 or a total cost of $118.00.
* The total recurring costs associated with achieving the targeted salaries for the 151 staff employee positions will be $770,526.51.  This additional cost will be funded out of the operating budget of the Libraries.

**Implementation of Market Equity Adjustment**

* Due to the large recurring cost, the total market equity adjustment is not achievable in one step.
* The adjustments are intended to be phased in over the 2006-07 and 2007-08 fiscal years in **two** increases.  Each increase will represent **half** of the difference between the employee’s current salary and the target salary arrived at through the processes described above.
* Effective as soon as administratively feasible, the first increase, representing new and recurring costs totaling $385,263.26, will be implemented.

**Implementation Dates**

* **April 19, 2007**   -   Announcement to All Staff regarding Implementation
* **April 20, 2007** -   Individual Memorandum to staff employees regarding their individual classification determinations and market equity target
* **April 23 - April 25, 2007**   -   Information Sessions
  + **Monday, April 23  -   1:30 pm  -   MSL 107**
  + **Tuesday, April 24  -   8:30 am   -  Smathers 100**
  + **Wednesday, April 25  -   11 am  -   MSL 107**
  + **Monday, April 30     -     4 pm     -     Smathers 100**

* **May 4, 2007**  -   Effective Date for TEAMS reclassifications and all market equity increases

**SECOND PHASE IMPLIMENTATION (UPDATED 10/31/07)**

* The second phase of the market equity increases for library staff employees has been approved by the library directors and authorized by the provost.
* Library Human Resources has been directed to make the second phase of the increases effective on November 2, 2007.  The resulting wage increases will first appear in the subject employees' paychecks on November 21, 2007, for the pay period of November 2 - November 15, 2007.
* The estimated additional costs, to be funded solely by the Libraries, for **the second phase** of the staff market equity increases are as follows:

|  |  |  |
| --- | --- | --- |
|  | **Total Recurring**  **Annualized Expense** | **Expense for this FY**  **11/2/07 - 6/30/08** |
| **Gross Wages** | $338,852.16 | $224,663.62 |
| **Wages and Benefits** | $399,845.54 | $265,103.07 |

* The estimated total annual costs, to be funded solely by the Libraries, for **both phases** of the staff market equity increases are as follows:

|  |  |
| --- | --- |
|  | **Total Recurring**  **Annualized Expense** |
| **Gross Wages** | $665,346.44 |
| **Wages and Benefits** | $785,108.80 |

* Individual Memorandum to staff employees regarding their individual classification determinations, market equity target, and any subject market equity increases will be issued in mid-November.

**Maintenance (2008)**

* Effective 09/19/08 staff employees at UF received an across the board pay increase equivalent to 2% of their annualized salaries.
* Midpoint targets for the Library Assistant and Associate classifications were increased by 2 % to reflect this event.  This allows for salary offers to be calculated equitably to the existing staff population.  The new midpoint distributions for the Library Assistant and Associate classifications are depicted [here](http://library.ufl.edu/committees/SSRC/documents/StaffSalariesPost2008ATB.xls).
* Salary levels for positions other than Library Assistant and Associate classifications were also increased by 2%.  IT Salaries are depicted [here.](http://library.ufl.edu/committees/SSRC/documents/ITSalariesPost2008ATB.xls)

**HSCL Integration into Smathers Staff Salary Structure (2010)**

With the integration of the Health Science Center Libraries into the Smathers Libraries, establishing pay for the HSCL employees at an equitable rate with their Smathers peers became a priority.

The process for reviewing the individual positions and establishing target salaries followed the same basic model as used at the Smathers Libraries in 2007 and described above.  The process for the HSCL positions mapped to library-specific classifications (Library Assistants and Associates) and those mapped to non-library- specific classifications (IT and others) is described below.

**1. Library Assistant and Library Associate Positions**

**Classification**

* Each position’s duties, as detailed in the position description (or PD), were compared by the unit and the Smathers HR Office and mapped to the appropriate Library Assistant or Library Associate classification.  The proposed mapping for each position was reviewed for appropriateness, equity and consistency by the HSCL Director.
* All mapping recommendations were then reviewed by UF Classification and Compensation.
* The results of the reclassification process are depicted here:

**Current Titles**

|  |  |
| --- | --- |
| **Current Title** | **Employee Count** |
| LIBRARY TECHNICAL AST SPV | 1 |
| LIBRARY TECHNICAL AST, SR | 6 |
| ARCHIVIST | 4 |
| ARCHIVIST, SR | 1 |

**Mapped Titles**

|  |  |
| --- | --- |
| **Mapped Title** | **Employee Count** |
| Assistant 1 | - |
| Assistant 2 | - |
| Assistant 3 | 6 |
| Associate 1 | 5 |
| Associate 2 | 1 |
| Associate 3 | - |

**Distribution of Current Classifications by Mapped Classifications**

|  |  |  |
| --- | --- | --- |
| **Mapped Classification** | **Current Classification** | **Employee Count** |
| Assistant 1 | - | - |
| Assistant 2 | - | - |
| Assistant 3 | LIBRARY TECHNICAL AST, SR | 6 |
| Associate 1 | LIBRARY TECHNICAL AST SPV | 1 |
| ARCHIVIST | 4 |
| Associate 2 | ARCHIVIST, SR | 1 |
| Associate 3 | - | - |

**Implementation of Reclassification**

* TEAMS.  Positions occupied by current TEAMS employees and mapped to the new Library Assistant or Library Associate classifications will convert to the appropriate new classification.
* USPS.  Positions occupied by current USPS employees and mapped to the new Library Assistant or Library Associate classifications will convert to the appropriate new classification only if the incumbent voluntarily elects to convert to TEAMS.  The decision to convert to TEAMS and convert to the new classification will have no bearing on the eligibility for market equity adjustments for USPS employees.  Market equity adjustments for USPS employees will be implemented irrespective of that employee's decision to convert to TEAMS.
* **New positions and promotions.**  Future HSCL job vacancies for positions with primarily library-specific job duties will only be posted as Library Assistant and Library Associate positions.  Accordingly, acceptance of one of these positions will require the employee to have TEAMS status.

**2. Positions Other than Library Assistants and Library Associates**

***IT Positions***

* 5 HSCL positions were reviewed and determined to be primarily IT positions.
* These positions were mapped into the appropriate IT classifications based upon the [UF classification descriptions](http://www.hr.ufl.edu/class_comp/classification/exempt/I.asp) and the current position descriptions.  The classifications for each of the HSCL IT positions was reviewed by UF Classification and Compensation and confirmed.
* The HSCL IT employees were assigned over three UF IT classifications: IT Specialist, IT Expert, and IT SR.
* During the 2007 Smathers market equity process, the complexity of duties, responsibilities, and technical requirements of the library positions assigned within each of the IT classifications was compared.  It was determined that there was sufficient distinction in these factors between the positions assigned to the IT Expert and IT SR classifications to require banding of those positions into salary tiers.  These tiers permitted internal equity between individual positions within these broad classifications based upon the level of the position's duties.  The target salaries for each classification and for the IT Expert and IT SR tiers within those classifications was determined based upon internal and external (campus) equity.  The result was the 2007 Smathers IT structure depicted [here](http://library.ufl.edu/committees/SSRC/SmathersITDesign.htm).
* This structure was last updated in 2008 as a result of the 2 percent across the board pay increases for UF employees effective 09/19/08.  The current Smathers IT Salaries are depicted [here.](http://library.ufl.edu/committees/SSRC/documents/ITSalariesPost2008ATB.xls)  HSCL IT employees were assigned target salaries based upon this structure.  The results of this process are depicted here:

|  |  |  |
| --- | --- | --- |
| **Mapped Classification** | **Tier** | **Employee Count** |
| IT Specialist | - | 1 |
| IT Expert | 1 |  |
| IT Expert | 2 | 1 |
| IT Expert | 3 | 2 |
| IT Senior | 1 | 1 |
| IT Senior | 2 |  |

***Non-IT Positions***

* There are 4 Non-IT positions occupied by HSCL employees.
* Each position’s duties, as detailed in the PD, were mapped to the appropriate UF classification and these mapping recommendations were then reviewed by UF Classification and Compensation.
* These positions were reviewed for internal equity and compared to salary data for occupants of the same classifications from UF and the Smathers Libraries in order to establish the target salary for the HSCL staff in these classifications.
* The result was that of these 4 positions, the current salaries of 2 fell below the peer (or target) salaries based on the classification and 2 positions had salaries at or above the market equity level for their classification.  Those whose current salaries fell below the target were subject to increases.

**Results**

* 17 HSCL staff employees are targeted for increases to their salaries.  This represents 81% of the HSCL staff employee population.
* The average target increase for those 17 employees is $5,424.
* The total recurring costs associated with the implementation of market equity adjustments fall into 2 categories:
  + Gross wages.  These are the difference between the targeted salaries and current salaries for those employees who are currently paid below their targets.
  + Fringe.  This marginal expense is the result of payroll taxes, employee benefits, and other nonwage expenses incurred by the HSCL as a function of any payroll increases.  These costs are a function of the individual employee’s salary plan.  The 2009-10 fiscal year fringe rates are available [here](http://www.uflib.ufl.edu/bus-serve/documents/FringeBenefitRates_001.pdf).
* The total recurring costs associated with achieving the targeted salaries for the 21 HSCL staff employee positions will be $124,543.  These additional costs will be funded out of the operating budget of the Health Science Center Libraries.

**Maintenance (2010)**

* Effective 07/01/10 staff employees at UF who met certain criteria received a pay increase equivalent to 1% of their annualized salaries.
* Midpoint targets for the Library Assistant and Associate classifications were increased by 1% to reflect this event.  This allows for salary offers to be calculated equitably to the existing staff population. The new midpoint distributions for the Library Assistant and Associate classifications are depicted [here](http://library.ufl.edu/committees/SSRC/documents/Staffbasesalaries7-1-2010.pdf).
* Salary levels for positions other than Library Assistant and Associate classifications were also increased by 1%.  IT Salaries are depicted [here.](http://library.ufl.edu/committees/SSRC/documents/ITSalaryStructure7-1-10.pdf)

**Maintenance (2011)**

* Effective 09/16/11 staff employees at UF received an accross the board pay increase equivalent to 3% of their annualized salaries. This increase was intended to help offset the legislative change that required employees to contribute 3% of their salaries toward their retirment benefits.
* Midpoint targets for the Library Assistant and Associate classifications were increased by 3% to reflect this event.  This allows for salary offers to be calculated equitably to the existing staff population. The new midpoint distributions for the Library Assistant and Associate classifications are depicted [here](http://library.ufl.edu/committees/SSRC/documents/Staffbasesalaries9-16-2011.pdf).
* Salary levels for positions other than Library Assistant and Associate classifications were also increased by 3%.  IT Salaries are depicted [here.](http://library.ufl.edu/committees/SSRC/documents/ITSalaryStructure9-16-2011.pdf)