

**Minutes of the Senate Budget Policies Committee**  
**Friday, November 20 2020**  
**2:00-4:00 p.m. via Zoom**

**Members in Attendance:** Tyler Bickford (Chair), Panos Chrysanthis, Yolanda Covington Ward, Mackey Friedman, Gary Hollibaugh, John Mendeloff, Juan Taboas, Ben King (SGB), Alexander Sunderman (GPSG), Jennifer Jones (UPPDA), Adriana Maguiña-Ugarte (SC), Brian Smith (McGowan), Jennifer Lee (Secretary), Emily Murphy, Melanie Scott, Frank Wilson, Mark Burdsall (Assistant Vice Chancellor, HR), Amanda Brodish, Richard Henderson, Thurman Wingrove, Stephen Wisniewski, Chris Bonneau, Lorraine Denman (Faculty Affairs), Susan Jones (U Comm)

**Absent:** Immaculada Hernandez, Wesley Rohrer, John Baker, Beverly Gaddy, Phil Wion, Dave DeJong

**Call to Order at 2p.m.**

**1. October Minutes: Approved**

**2. Matters Arising?**

TB: Question about the Provost saying that one-time PPEP expenditures could be reimbursed by the federal government.

SW: CARES Act/FEMA are sources for possible reimbursement, for example: hotels for students, educational equipment, PPEP. Funds from the original CARES ACT was to reimburse students for their expenditures. We're applying for this money, but not sure the status.

TW: We're trying to ensure we're not requesting the same dollar twice; in early December we'll file with FEMA; we need to make sure we don't double apply for reimbursement.

- CARES Act money – some is used up front, some disbursed gradually;
- FEMA sends money to state and state disburses to us; they may keep some (25%).

SW: Costs are reviewed every other week.

TW: FEMA and CARES Act reimburse different things.

TB: If this is successful, is it possible that some of the cuts made this year could be addressed?

TW: Still to be determined; it's doubtful that any of the money will go into the quasi endowment. Most likely it will go return to the university.

**3. Update on the Staff Reclassifications and Salary Benchmarking Process and Report on Staff Performance Evaluations—Mark Burdsall, Assistant Vice Chancellor, Consulting Services**

MB: [“Shaping the Workplace Update”](#) (See Appendix Below; Available on BOX)

Performance Appraisals: Historically, staff reviews have been decentralized. This year’s goal was “compliance,” to make sure all university staff received an annual performance review. As of Oct. 30, 95% have. (146 still to go); Working with Clyde Pickett on a Diversity and Inclusion Standard, and looking at an on-line mode for the process (right now, it’s a PDF). This year’s audit is focused on the form of the appraisals, rather than content. Planning a January 4 roll out.

TB: Curious about the audit work load; I’ve heard it’s pretty time intensive. Is it manageable?

MB: We’re looking to audit 10%: about 700 reviews. (Doing this with one staff person.) A “technology solution” would help with this process, especially next year when the audit is looking at the quality (content) of reviews.

JT: Notes lost granularity in criteria in the process of making the form more accessible. To make a form usable for everyone, we’re going to lose even more; which is important for research technicians, etc.,

MB: We want there to be flexibility. We don’t intend for there to be just one form to use—the review form should have: 1. Specific Standards for Specific Jobs, and 2. Goals (Accurate, Timeliness, Completeness).

JT: Faculty evaluations are really different than that!

MB: We instituted a supervisory training program, a big part of which is performance appraisal. This is being rolled out with a 68-person focus group, half of whom have been in the position for a year or more, the other half a year or less. Likely opened to other supervisors as early as spring.

AM: Has heard staff propose 360 feedback.

SB: Yes, this is on his radar, and is used in some places in the university. Values “upward” feedback and thinks we should have it. Part of the challenge is confidentiality; but he values the reciprocal appraisal process.

AM: A way for people to communicate in instances where, for example, tasks/expectations were not articulated clearly, etc.,

MB: Project Overview: “Compensation Modernization”—Moving from “Job Classification” to “Job Groupings.” Currently there are upward of 80 Classifications, so many titles/job descriptions that it makes benchmarking difficult; some 2000 specific job titles that will be rolled into job groupings consistent across the university.

- Job Analysis Questionnaire asking people what they do in their jobs; used to create job groupings; then we met with leadership of job groupings.
- Subject Matter Expert Validation is almost complete.
- Career Framework will show paths within groupings, as well as for transfer across job groupings.

Working Timeline: January/February Dave DeJong will seek approval from the administration; Total Compensation—pay plus benefits; will benchmark.

YCW: Asks about benchmarking for salaries of staff: Is it within Pittsburgh or regional?

SB: It depends: now that we have job groupings, it depends on the job. Working with Segal Consulting to figure out if the job will be a national match (i.e., leadership); those that are more entry level will likely be benchmarked with local/regional markets. Historically the benchmarking would be within the university, but this is moving outward.

YCW: Would people's salaries only change if their units were seeking to make an adjustment, or will this happen across the board?

MB: He'll look at equity within the unit, equity across the university. Right now there isn't good data to do this; he'll be looking for egregious disparities, salaries far off from market norms.

AM: Asks about the habit, or inner knowledge, that to get a better salary you have to change units. If jobs will be more equitable across the university, that migration will be less important.

MB: That's a positive; careers could then be motivated by other things, the content of career for example, rather than trying to be paid more equitably—the university as “one” rather than competing internally.

AM: The reality is that different departments have different budgets; it comes down to what a unit is willing to pay. This is a budgetary issue that makes that equity difficult.

MB: All these goals depend on senior leadership approval.

JT: Does this mean that the salary range for a position will get smaller? At the same time, there's a huge range of specialization, and so achieving equity is difficult. Envisions “salary shock.” It would be great if the university could provide some cushion for pay increases, for example, that aren't covered by grants.

MF: Interested in mechanisms we can build into HR for promotion, and so have better retention. Right now, we can't negotiate promotion nimbly. What is HR working on?

MB: You'll be the person to work with those employees; the job groupings will make the paths clearer, so you'll be able to guide staff.

BS: Will staff appraisals be sent to HR and tracked so that we can see trends? At Staff Council the constituency talks about the salary increase split, giving an even amount across the board to everyone. Is that something HR will step in to do something about?

MB: We can audit. With a technology solution, we can look at “central tendency” – everyone getting the same rating – and then “severe” ratings and “lenient” ratings to see how supervisors are rating people as objectively as possible. We need supervisor training so that, for example, supervisors know how to identify high performing staff, etc.,

BS: Is there a way to access someone’s reviews before hiring? Within the university, an analysis from HR?

MB: Ask “What were you given as a developmental thing to work on?” in any external hiring interview.

AM: If someone has been stellar, that should be information that is available to prospective supervisors. Not word of mouth, but a record that can be accessed; and performance reviews are the employee’s property, so they can show this if they so choose.

TB: Asks about the timeline, for example, Mackey’s question about promotion.

MB: The new system will hopefully be implemented in July, 2021. Promotion still must be posted.

TB: Mackey has to post an opening if he wants to promote someone?

MB: Yes, if an internal candidate, it has to be posted internally because we have federal contracts. We were audited and were not posting, only opening jobs to who we wanted while no one outside that closed circle knew about the job. (Posting internally) is required, but also something we should do: it’s the right thing.

TB: We receive faculty salary reports on this committee, and now there’s the social justice dashboard. There are reports about salary equity by rank and race, gender equity by rank and race. It sounds like you’ll have a system with much data. Would you commit to providing data on staff to this committee?

MB: Leadership will have that information, but it’s their decision whether and to whom to provide that data.

TB: This committee would be thrilled to have the data, and we can find ways to put our request through the usual shared governance channels.

AM: Asks about “promotion padding,” trying to promote someone you’ve been working with, but after posting, you actually find someone who is on paper more qualified.

MB: Talks about a former boss who said that to promote someone, you should be sure they can do the job, or most of it. If this person you’ve been working with can in fact do the job, they will be the best person.

AM: Notes that some people are interested in developing a career at Pitt, others are here for benefits and supplemental salary—different drivers for promotion, etc.,

JT: Is there a way to coordinate Pitt and UPMC?

MB: If you have thoughts about that, please share. Talks about sharing HR resources with CMU and UPMC, and would be interested in a dialogue about specifics.

JT: At the very least sharing the database of “no hires” from one to the other.

MB: Likely not legal; though we could look at lateral movement, and at who left the university.

TB: Asks about the salary increase appeal procedure: Is that something you could add to the audit?

TW: Not sure if there is a University wide procedure; thinks it is unit-by-unit.

TB: Does staff know that?

AM: Each unit has developed a “reconsideration of salary” procedure.

MB: Employee Labor Relations is the resource people can turn to.

TB: There should be written and disseminated policies in each responsibility center. Our committee is responsible for overseeing those policies; it’s our job to make sure you make sure those policies exist. Perhaps this is something we could look at.

MB: In March, we look at resources for increases for staff: memos, policies. Says he will email the person who keeps track of this in HR.

TB: Can we invite you back next year for another update, perhaps next fall?

MB: Yes.

**Meeting Ends: 3:50 p.m.**

# Shaping the Workplace Update

Compensation Modernization and Performance Review and Development

November 20, 2020



## Shaping the Workplace Update: Performance Appraisals

- **All Staff to Receive an Annual Performance Appraisal**
- As of October 30
  - 100% of RCs have submitted Annual Staff Performance Appraisal Compliance Forms
  - Of the 7234 staff at Pitt, 6871 or 95% have received appraisals
  - Reasons given for 5% who have not received appraisals:
    - staff in provisional period of employment; staff on leave; staff have left University; multiple pressures due to COVID-19; supervisor has not submitted
    - Of the 5% of employees that have not received an appraisal, 146 are eligible
- **Next Steps**
  - Follow up with RCs that have submitted compliance forms but have not completed all appraisals
  - Perform audit of random sample of appraisals to confirm completed appraisals meet minimum criteria stated in the University's Annual Performance Appraisal policy

# Shaping the Workplace Update: Performance Appraisals

- **A More User-Friendly Performance Appraisal**
- A modified performance appraisal was drafted in consultation with the Performance Review Working Group and successfully piloted with OHR staff in Spring '20
  - Additional modifications have since been made to include a Diversity, Equity, and Inclusion performance standard
  - Feedback on this standard has been received by the Performance Review Working Group and Employee Relations
- **Next Steps**
  - Review by VC ODI and VC OHR
  - Publish and use as pilot for FY '21 Staff Performance Appraisal and as default Staff Performance Appraisal for FY '22

## Project Overview

1	✓ <b>Job Analysis</b> <i>Gather information via Job Analysis Questionnaires and submitted changes to Job Descriptions</i>	 Completed
2	✓ <b>Job Organization</b> <i>Review job analysis and group similar roles into University jobs</i>	
3	✓ <b>Market Assessment</b> <i>Develop benchmarking methodology and identify market matches</i>	
4	<b>Subject Matter Expert Validation</b> <i>Verify job groupings and market matches with Subject Matter Experts</i>	 Current Status
5	<b>Career Framework</b> <i>Create and level University jobs into career paths</i>	
6	<b>Salary Structure</b> <i>Develop a market-based Salary Structure and Pay Administration Guidelines</i>	

## Working Timeline



- Complete the validation review by mid-November
- Anticipate present initial/preliminary structure to Senior Leadership at end of January/early February
- Upon approval from Senior Leadership, make refinements as necessary and move the project to the completion and implementation phase

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