Florida Gulf Coast University

Staff Compensation and Classification Study

Kick-off Meeting

February 8, 2020

Segal

Agenda

1. **Introductions**
2. **Project Objectives**
3. **High-Level Project Plan**
4. **Project Dashboard**
5. **Project Structure and Roles**
6. **Project Communication**
7. **Stakeholder Interviews**
8. **Immediate Next Steps**

Introductions

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Project Objectives

Scope of Engagement

This engagement will include:

- 925 staff employees

- 250 unique job codes

Desired Outcomes

- Compelling value proposition for staff employees

- Stakeholder involvement and input

- Total rewards/compensation philosophy

- Competitive salary market assessment

- Contemporary, competitive, and equitable salary structure

- Pay administration guidelines

- A clear implementation and comprehensive communications plan

High-level Project Plan

We expect this work to take approximately ten months as outlined below. We will work with FGCU to refine the work plan as needed and attach specific dates for key meetings

Phase	Month									
	1	2	3	4	5	6	7	8	9	10
Phase 1: Project Initiation/Discovery and Compensation Philosophy	▨	▨	▨							
Phase 2: Job Structure Review		▨								
Phase 3: Salary Market Assessment			▨	▨	▨					
Phase 4: Salary Structure Development					▨	▨	▨			
Phase 5: Present Final Results								▨	▨	
Phase 6: Change Management, Communications, and Implementation									▨	▨

Once the interviews/focus groups are scheduled, Segal will develop a detailed project plan in Excel including all work steps, responsibilities, specific timing, etc.

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Project Dashboard

- A project dashboard will be provided for every project check-in meeting to keep the Project Team and stakeholders informed of progress against the project plan

Current Phase	Key Deliverables

Description	Task Owner	Due Date	Status	Comments

Key Activities Completed and Decisions Made	Outstanding Decisions / Tasks

Upcoming Milestones / Tasks	Key Risks

Project Structure and Roles
Collaborative Process

FGCU Senior Leadership
- Provides leadership perspectives for development of strategy and design
- Confirms strategy
- Endorses the program outcomes within areas of responsibility
- Sponsors project and establishes direction

Segal
- Serves as subject matter experts and conducts analysis and develops programs/deliverables
- Ensures key deliverables are completed on time
- Plans and facilitates project meetings and conference calls
- Prepares reports of findings and recommendations
- Serves as a resource for implementation of recommendations, as needed

FGCU Core Project Team
- Collaborates with Segal throughout the project and is the primary contact for FGCU
- Provides insight, feedback and input into the recommended processes and recommended direction
- Provides insights into strategy/philosophy
- Is involved in day-to-day project activities as needed
- Provides data needed for study purposes

FGCU Compensation Strategy/Steering Committee
- Provides insight, feedback and input into the recommended processes and recommended direction

Collaboration between project groups is critical to success. Are there additional stakeholder groups who should be involved?

Project Structure and Roles
Compensation Strategy/Steering Committee

Purpose of the Committee:

- Provide guidance to and support the compensation initiative process

- Provide input and feedback on products/deliverables created as a result of the compensation work

- Enhance communications with staff throughout the project to:
  - Create a valuable transparency of process;
  - Build support and buy-in for project recommendations; and
  - Be a "point of contact" for staff who have questions about the project
  - Encourage employees to participate in the process as opportunities arise
  - Serve as a resource to the consultants on staff perceptions, needs, and interests
  - Serve as a sounding board to the consultants for project findings and recommendations
  - Communicate and support findings and recommendations

Partnership Opportunities:

- Committee efforts will vary throughout phases of the project

- Highest levels of effort are typically expected in the following phases:
  - Stakeholder Interviews
  - Compensation Philosophy Development
  - Market Assessment and Recommendations

Does FGCU plan to engage a committee for the project?

Project Communication

- Throughout the engagement, we will work with FGCU to identify the appropriate and best level of communication to various stakeholders at the institution (e.g., staff, human resources, senior staff, and leadership)

- In our experience, keeping the campus community apprised of the assessment process, results, and outcomes builds trust and credibility and enhances the implementation process

- It is also important to communicate the anticipated outcomes of the assessment from the beginning so as to set accurate expectations (e.g., "not everyone is going to receive a raise as part of this process")

Discussion Questions

- Who are the key audiences?

- To what extent do they need to be apprised of project status and progress?

- What level of detail should be shared with each group?

See Appendix for additional communications materials.

Stakeholder Interviews/Focus Groups

Interview topics may include:

- Understanding FGCU's culture, values, goals, and current compensation programs
- Compensation philosophy for staff, including comparison markets and pay positioning
- Challenges with regard to current compensation programs; opportunities for change
- Desired future state

	Name	Role	E-Mail	Phone #
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

See Appendix for illustrative discussion items.

* Our engagement currently includes 5-7 virtual focus groups

Immediate Next Steps

Data Request

- FGCU to review data request and submit data items

- Segal to review data items

Stakeholder Interviews/Focus Groups

- FGCU & Segal to determine dates for stakeholder interviews/employee focus groups

- FGCU to finalize interview list and schedule for interviews/focus groups
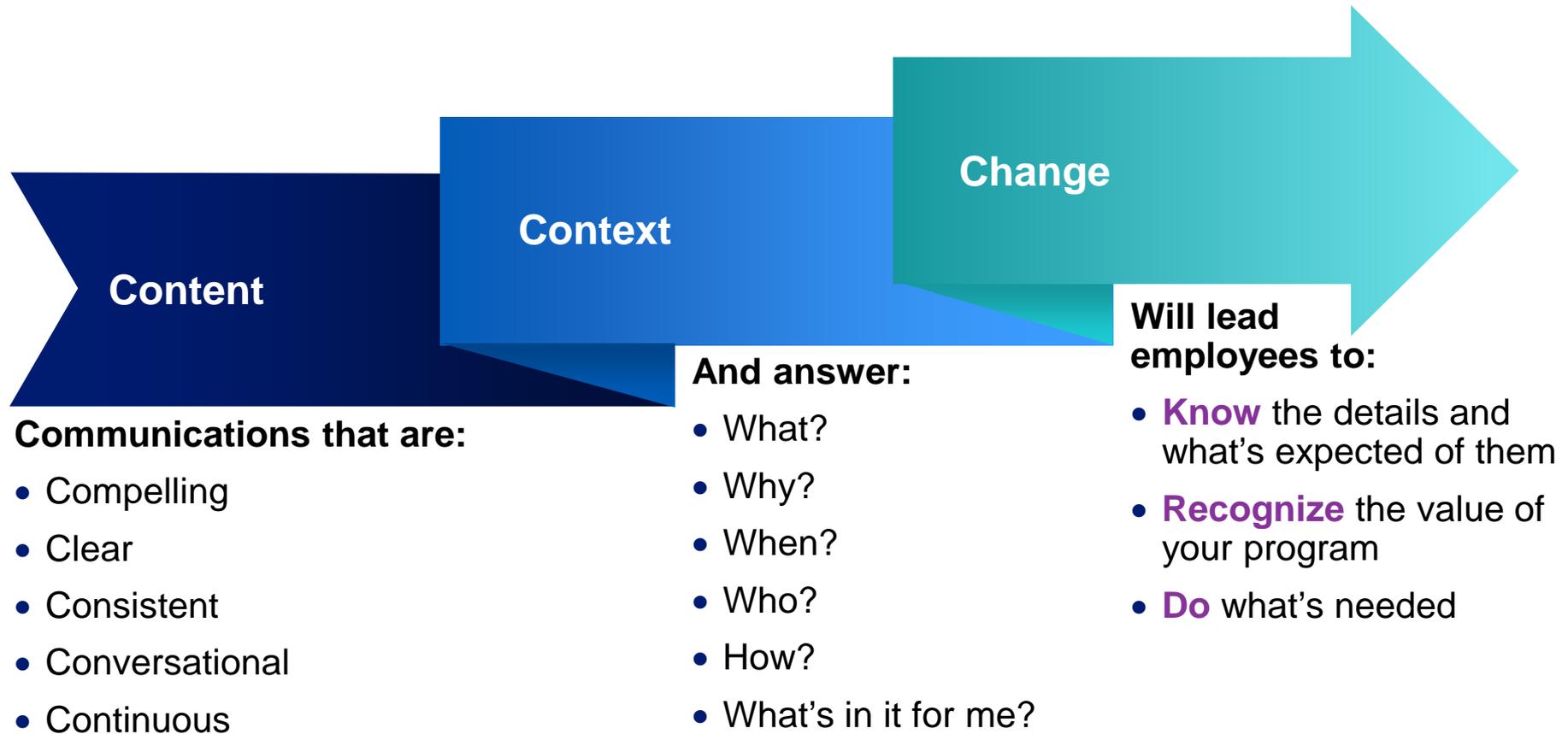
- Segal to prepare discussion guide(s)

Project Management Items

- Segal to provide draft project introduction memo for broad distribution

- FGCU to grant Segal to CUPA-HR DataOnDemand site

- Schedule FGCU/Segal bi-weekly check-in calls

Appendix

Communications

What's the story?

Content

Context

Change

Communications that are:

- Compelling
- Clear
- Consistent
- Conversational
- Continuous

And answer:

- What?
- Why?
- When?
- Who?
- How?
- What's in it for me?

Will lead employees to:

- **Know** the details and what's expected of them
- **Recognize** the value of your program
- **Do** what's needed

Communications

How does the program affect me?

Who is affected and how? Who are the sponsors and messengers for the program?

- Steering Committee
- Senior Leadership
- Human Resources
- Managers/Supervisors
- Staff

CONSTITUENT

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What's in it for me?

(-)

"What am I afraid of losing?"

Communication Deliverables

Phase 1: Create Awareness

Phase 2: Build Understanding

Phase 3: Develop Commitment

Phase 4: Move to ACTION
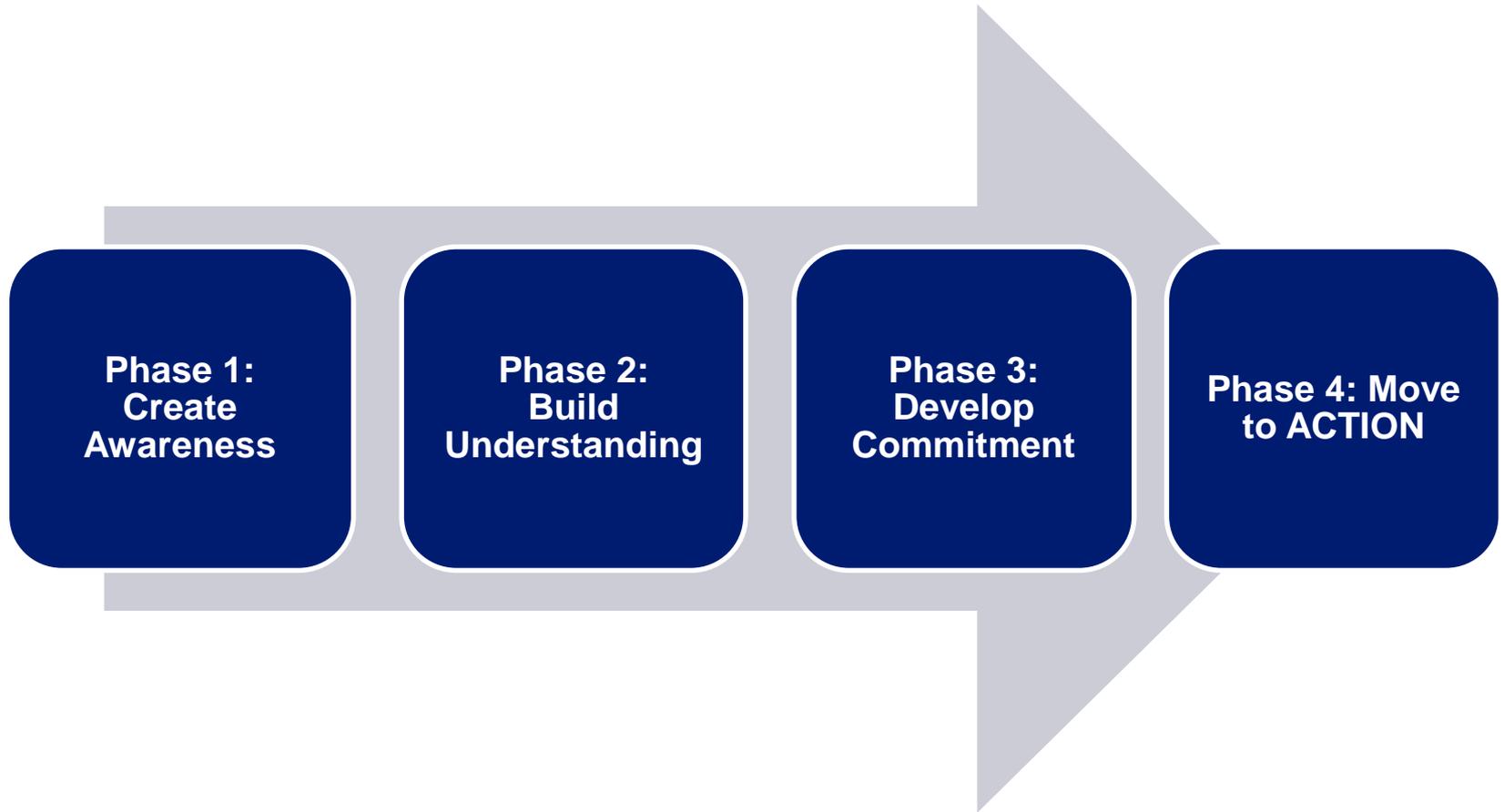
Illustrative Total Compensation Philosophy Discussion Items

Recruiting Talent

- What attracted you to FGCU? Why do you continue to stay?

- From where does FGCU typically recruit staff? Where do people go when they leave? Does this differ by role, level, or area/department?

- How successful is FGCU in attracting and retaining qualified talent? Are there any populations that you are especially concerned about losing or have trouble hiring?

Compensation and Benefits

- Describe the current total compensation strategy as you perceive it. Do you agree with its intent? How well is it executed?

- What works and what doesn't with the current approach to compensation and benefits? How do staff perceive their compensation and benefits?

- How competitive are today's pay and benefits programs?

- How should pay and benefits be positioned relative to the competitive market? To what extent should this differ by role, level, or job family?

- To what extent should pay differ by length of service, performance, or other factors?

Process and Communication

- To what extent do staff understand the compensation program?

- How well do you think the current processes for making pay decisions (e.g., starting salaries, promotional increases, etc.) work? How do you think they are perceived and understood by staff?

Data Request

General materials

Status	Data Items
	• Organizational charts
	• University strategic plan or strategy documents
	• Current compensation philosophy for staff (if documented) – formal or informal
	• Information about current pay practices and current process used for obtaining market data (e.g., what surveys are used, what cuts, what data is pulled)
	• Current peer groups/comparison market criteria for staff compensation, including list(s) of institutions
	• Access to CUPA-HR DataOnDemand (can be done through e-mail to their Research Team)
	• Pay administration guidelines/handbooks for staff - whether formal or informal
	• Staff job descriptions
	• Information on job evaluation, classification, and titling
	• Salary increase history, guidelines, and criteria for annual increases as well as adjustments resulting from periodic pay studies (if available)
	• Salary structure (including range minimums/midpoints/maximums) or informal ranges in the absence of a structure
	• Information from prior benchmarking studies, if any
	• Communication strategy on compensation, job evaluation/classification, etc. (including examples of relevant communication materials)
	• Other materials that you feel are relevant to this work

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Data Request

Staff census data

Status	Data Items
	• First and Last Name and/or Full Name
	• Employee ID
	• Hire Date
	• Start Date in Current Position
	• Job Code
	• Job Title

	• Incumbent's Organizational Unit
	  – Division—Name of incumbent's major function unit (e.g., Administration)
	  – Sub-Divisional Unit—Name of incumbent's area within the division (e.g., Human Resources)

	• Incumbent's Work Schedule
	  – Full-time or Part-time (indicate % full-time) (e.g., FTE)
	  – "Full-time" work week (35, 37.5, or 40 hours)

	• Current Salary (if part-time or part-year, please do not annualize salary)
	• Pay Grade (if part of salary structure)
	• FLSA Status
	• Supervisor (if easily available)