Classification and Compensation Study

Listening Tour Sessions Overview - January 2019

This is an overview of common topics raised throughout all five listening sessions held in January. While some employees raised concerns regarding individual positions, this summary addresses general areas of concern represented by participants.

Purpose

As we work through the complex process with various employee groups, it is evident that there are questions and concerns regarding the Classification and Compensation Study implementation. Human Resources Director Holly Schoenherr and other HR staff members held five Listening Tour sessions in January to understand areas of concern and determine how to make improvements moving forward.

Current Status

Phase I: Focused on classified service, we are concluding Phase I with secondary review results. At the time of the Listening Tour, the final results hadn’t been shared with employees as Human Resources, Evergreen and impacted departments were ensuring that all recommendations were thoroughly reviewed and supported by management before final results were shared with employees.

- 43% or 1,031 classified employees received an increase in pay in September 2018
- 82% of classified employees moved to a pay grade with a higher midpoint than their current pay grade
- 523 employees requested a secondary review of their results

Phase II: Begins with exempt classification, exempt pay plans and recommendations to the Personnel Board about new methods to address and recognize career growth. We will then turn our attention to internal equity rank compression (similar pay for supervisor and their employees) and range compression (employees in the same job with different levels of experience earning the same pay). We began discussion with Appointing Authorities in February.

Listening Tour Dates & Locations

January 17, 8:30 to 9:30 a.m. | Utilities Building, 14 S. Fort Harrison Avenue, 4th Floor, Clearwater
January 22, 7:30 to 8:30 a.m. | GMD North, 3900 Dunn Drive, Room 109, Palm Harbor
January 23, 12:30 to 1:30 p.m. | Extension, 12520 Ulmerton Road, Magnolia Room, Largo
January 28, 12:30 to 1:30 p.m. | Justice Center (CJC), 14250 49th Street North, Room 2330, Clearwater
January 30, 7:30 to 8:30 a.m. | South Cross Bayou, 7401 54th Avenue North, St. Petersburg

Common Themes Overview

Career Ladders | Timeline | Process | Evergreen | Engagement & Communication

Listening Tour Numbers

<table>
<thead>
<tr>
<th>Appointing Authority</th>
<th>Number of Staff Attending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board of County Commissioners</td>
<td>102</td>
</tr>
<tr>
<td>Clerk of the Court</td>
<td>11</td>
</tr>
<tr>
<td>Property Appraiser’s Office</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>114</td>
</tr>
</tbody>
</table>
Careers Ladders

Range compression and rank compression
Phase II will address internal equity (range compression and rank compression). Rank compression looks at pay variation between supervisor and direct reports. Range compression looks at internal equity and how employees are paid within the same classification in the department.

Career ladder process
Personnel Rule 2, Filling Positions, outlines three steps for career ladder promotions. Classified positions are required to be filled through a competitive process; however, career ladders provide an exception whereby employees can be directly appointed to a higher level classification.

1. The Personnel Board has to identify classifications that would be part of a career ladder. There were five career ladders that lost rungs with the consolidation of classifications.
2. Departments identify the criteria for employees to be eligible for career ladder promotions.
3. There has to be a business need for the higher classified position to be filled, as determined by the department.

Proposed Career Step Increase Policy
We recognize the importance of employees receiving recognition for demonstrating valuable skills and competencies. Human Resources and the Appointing Authorities are discussing a proposed policy that would allow Appointing Authorities to award in-range pay adjustments that increase an employee’s base pay rate within the employee’s current salary range and job classification. The purpose of the policy, if adopted, is to recognize significant employee competency enhancements as documented by departmental criteria and development plans. The proposal also encourages the use of working titles to recognize levels of achievement.

Classification Consolidation
Classifications that have been consolidated will be evaluated first as any new career step policies are implemented. As we consolidated positions, one career ladder was eliminated and five lost rungs.

Next steps: Human Resources (HR) is working with Appointing Authorities to identify methods to provide opportunities for advancement within the new classification structure. We recognize that career ladders are very important to employees. That process is moving forward as we engage stakeholders and those impacted to make sure that we get it right.

Timeline

Why was it rushed in the beginning?
It was important to implement the new classification structure and pay plans before the end of FY18 so the general increase would be applied to the new pay grades. As a result, 82% of classified employees benefited from the general increase being higher because the implementation occurred before October 1st. Next steps: As we move forward, we are focusing more on quality and a thorough process over speed.

When will Phase II occur?
Phase II will be throughout FY19. It is important that we involve the right people and give them sufficient opportunity to review what is being proposed instead of meeting a deadline.
Process

What was the intent of the study?
The intent was to review all jobs across the Unified Personnel System to make sure Pinellas County’s pay rates and policies are in line with peer organizations, and to keep the County a competitive employer in the market. This study was not intended to review individual employees’ performance or longevity.

What was the process?
Employees completed their JATs in June of 2017 (90 percent of employees completed JATs). Supervisors had an opportunity to provide comments (90 percent of supervisors provided input). Evergreen took that information and looked at organization charts, current class specifications and other data. The combined number of classified and exempt classifications was over 650. Evergreen took a few months to gather all the information and in May of 2018, they presented recommendations. They recommended 3 options for the classification and compensation structure:

- Option 1: Broad branded structure would have been an extensive change and would reduce from 650 to 49 classifications.
- Option 2: Minor modification would reduce classification from 650 to 630.
- Option 3: Moderate consolidation would reduce classifications from 650 to 560 and would consolidate a number of classifications into the new structure.

Human Resources engaged Appointing Authorities in the development of the process and timeline. Appointing Authorities were provided a file with all of the positions in their area and the impact of the three options. The Appointing Authorities felt it was the best choice to proceed with Option 3, moderate consolidation. Human Resources conducted meetings with each Appointing Authority to address questions and concerns prior to presenting recommendations to the Personnel Board.

Secondary Review Results
At the time of the Listening Tour sessions, secondary review results were still being finalized and had not been shared with impacted employees.

Did all employees have an opportunity for a secondary review request?
Yes, all classified employees had an opportunity to submit a secondary review request. Those employees who had a downward reclassification/reallocation have additional appeal opportunities.

Why not release secondary reviews that have been finalized?
Leadership felt that it was fair and equitable for all impacted employees to receive the results at the same time and have the same window of opportunity to submit appeals following the results, if applicable.

Who will have rights to appeal?
Employees that had a downward reclassification will have the opportunity for further appeal beyond the secondary review process. The first step is to appeal to Human Resources and the second step is to appeal to the Unified Personnel Board. A downward reclassification is defined as a decrease to the maximum of the employee’s pay grade; it is not associated with a change in title or pay rate.

Errors
Calculation errors
As pay adjustments were calculated, an error was made by Human Resources which affected 117 employees. We had to bring that to the attention of impacted Appointing Authorities because the approved methodology was being applied incorrectly.
Human Resources staff are required to follow rules and procedures that were put in place by the Unified Personnel Board and had to follow the methodology that had been approved.

**Process improvement:** Human Resources is establishing quality assurance procedures for future pay rate calculations; we are also committed to communicating this type of negative news in a more personal and caring manner.

**Will adjustments be retroactive?**
Guidance received from the County Attorney’s Office indicates that retroactive pay increases are not in compliance with state law.

**HR should’ve called a face-to-face meeting to explain the process you went through when issues arose.**
While HR was in communication with Appointing Authorities, we understand that face-to-face meetings regarding these issues would have been beneficial to employees as well. This is why HR arranged 5 general listening sessions with employees throughout the County to gather feedback and explain the process as we move forward. Human Resources is working with all Appointing Authorities to identify the best ways to communicate with employees about the process.

### Evergreen

**Did Evergreen read all the employees’ JATs?**
Yes. Evergreen read every the Job Assessment Tool (JAT) that was submitted, and supervisors had an opportunity to add additional information. We engaged regularly in the review process with Evergreen and it was clear to us that they have reviewed all the JATs. Evergreen reached out to supervisors if there was conflicting information.

**Why didn’t Evergreen Solutions come to talk to people about what they do?**
Studies of this type and magnitude do not typically involve in-person interviews. The process was designed to ensure that the JAT would capture the essential functions associated with each position. Supervisors were given an opportunity to review and add comments to their employees’ JATs. With that information, Evergreen came back with preliminary recommendations.

**Employees expressed concerns over the selection of Evergreen Solutions.**
It is typical for any company that does this type of work to have negative feedback. Normal purchasing procedures were followed, and references were checked. The selection committee consisted of:

- Lisa Arispe, EAC Representative, BCC, Public Works
- Greg Carro, BTS
- Mary Flockerzi, Human Resources
- Jack Loring, Human Resources
- Canaan McCaslin, BCC, County Administration
- Ashley Skubal, EAC Representative, Clerk’s Office

Evergreen was identified as the top-ranked firm due to their experience conducting similar studies for other Florida counties.

**How long is the contract with Evergreen?**
The contract is scheduled to expire at the end of March 2019 but we still have exempt positions to address and secondary review results to finalize. We will extend their contract as long as it takes for them to complete the work they were hired to do.

**How many people from Evergreen worked on the Study?**
A core team of four people were fully dedicated but others were involved as needed.

[www.pinellascounty.org/hr/study](http://www.pinellascounty.org/hr/study)
What was the time frame?
JATs were submitted around end of June 2017 and analysis concluded by May 2018.

Engagement and Communication

Engaging managers
Throughout this process, we heard from employees that involving managers and preparing them to share information with employees is an important step in transparency and moving forward. Process improvement: Supervisors stated that ahead of Phase II, managers needed to receive and identify information before employees so the right results are implemented with the best outcome. Human Resources is working with Appointing Authorities to ensure enhanced internal communication.

Communication timing
We have heard from employees that sharing information on a Friday afternoon is not well received – even if information becomes available then. We are making adjustments to address those concerns – especially for departments that have employees that may not work on Fridays.

Next Steps

Phase I: Secondary review and further appeal process: As soon as we finalize secondary review results, the information will be shared with employees:

- Employees will be informed if they are eligible for further appeal (those who received downward reclassification).
- For those who do not have further appeal rights, Human Resources will help supervisors have conversations with employees.

Phase II

Phase II includes plans to implement recommended classification and compensation changes for exempt employees. Human Resources will follow the same process as Phase I by asking Appointing Authorities to give us feedback on the recommendations they feel that they’d like Evergreen to further evaluate. There will be a secondary review process for exempt employees. Human Resources will communicate the proposed timeline for Phase II. Once we finish that process, addressing internal equity (range compression and rank compression) is planned in 2019.

Three primary components:

1. Exempt classifications and pay plans (working with Appointing Authorities on what they’d like to see for pay plans)
2. Looking at different ways to provide career ladders and career steps – HR will seek feedback and suggestions from Appointing Authorities and employees
3. Addressing internal equity (compensation) – rank compression (distance from supervisor pay to those they supervise) and range compression (how employees are situated within same pay range)

The Board of County Commissioners has dedicated $2 million in the FY19 budget (for positions funded by the General Fund) to addressing the three primary components of Phase II. Funding will first be focused on addressing pay adjustments for Exempt positions, then addressing internal equity as budget allows.