

Position Study Equity Analysis Report



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Equity Analysis Rationale

In September 2022, the City of Madison Human Resources (HR) Management Team was selected for the Results for America Fellowship to advance job quality outcomes within HR practices. The major focus of this Fellowship is to update the City's Personnel Rules in 2023, which were first written in 1970. As input to the revision of the Rules, HR began a racial equity analysis on a major pain point: the position study process.

For years, employees expressed concerns regarding lack of clarity in accessing the position study process, transparency regarding what happens once the process begins, and uncertainty in decision making regarding the outcomes with potential disparities across gender and race. Time to complete a position study is substantial workload for HR and varies in duration depending on competing priorities for HR staff time. The primary responsibility is citywide recruitment, secondary responsibility is position studies. The impact is felt by staff citywide as customer service frustration.

Completion of this project meets advocacy requests of employee groups citywide. This report details findings and recommendations for improving the position study process including input from those employee groups and individuals impacted by the process.

Contributors

A team of eleven City staff met four times for a total of eight hours to conduct this analysis.

Thank you to the Team for your thoughtful contributions:

- Abigail Ferguson – Information Technology, Women's Initiative Committee (WIC)
- Ana Martinez – Finance, Multicultural Affairs Committee (MAC)
- Byron Bishop – Civil Rights
- Emaan Abdel Halim – Human Resources
- Eric Halvorson – Traffic Engineering, Madison Professional & Supervisory Employees Association
- Hannah Mohelnitzky – Engineering, Women's Initiative Committee
- Javian Dayne – Human Resources
- Julie Trimbell – Human Resources
- Karalyn (Kara) Kratowicz – Human Resources, report author
- Mary Richards – Finance, Women's Initiative Committee
- Nancy Saiz – Community Development, Multicultural Affairs Committee

We also thank the ad-hoc contributors who provided input on this topic for the final report:

- City employees who went through a position study and proactively gave qualitative feedback to the above team on their experience with this process
- Brad Wollmann – Budget & Data Analyst, Human Resources
- Charles Romines – Superintendent, Streets and Urban Forestry
- Christine Koh – Budget Manager, Finance
- Dave Schmiedicke – Director, Finance
- Emily Jamieson – Organizational Development Coordinator, Human Resources
- Erin Hillson – Director, Human Resources
- Sarah Edgerton – Director, Information Technology

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Equity Analysis Questions

A full City of Madison [Equity Analysis](#) includes the following questions which were discussed by the Team:

- What:
 - What is the policy being analyzed and what does it seek to accomplish?
 - What do available data tell you about this issue?
 - What data are unavailable or missing?
 - What factors (including existing policies and structures) associated with this issue might be affecting communities of color and/or low-income populations differently?
 - Which focus area(s) will the policy primarily impact?
- Who:
 - Who could be impacted by the issues related to this policy, plan or proposal?
 - Who would benefit?
 - Who would be burdened?
 - Are there potential disproportionate impacts on communities of color or low-income communities?
 - Have stakeholders from different racial/ethnic and socioeconomic groups been informed, involved and represented in the process? Who is missing and how can they be engaged?
 - What input have you received from those who would be impacted and how did you gather this information?
- Why:
 - What are the root causes or factors creating any racial or social inequities associated with this issue?
 - What are potential unintended consequences? What benefits or burdens may result?
 - What identified needs are being met or ignored in this issue or decision?
- Where:
 - Are there differing impacts on various areas of City government?
- How:
 - Describe recommended strategies to address adverse impacts, prevent unintended negative consequences and advance racial equity.
 - Is the proposal:
 - Realistic?
 - Adequately funded?
 - Adequately resourced with personnel?
 - Adequately resourced with mechanisms (policy, systems) to ensure successful implementation and enforcement?
 - Adequately resourced with provisions to ensure ongoing data collection, public reporting, stakeholder participation, and public accountability?
 - If “no” to any of the above, what resources or actions are needed?
 - Who is accountable for the decisions?
 - How will impacts be documented and evaluated? What are the success indicators and progress benchmarks?
 - How will those impacted by this issue be informed of progress and impacts over time?

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Executive Summary

The position study equity analysis arose at request of HR management, Employee Associations, and a number of citywide initiatives (Racial Equity and Social Justice Initiative, MAC, and WIC). This process is a known pain point for the city. Time to complete a position study is directly impacted by the volume of recruitments citywide and varies in duration depending on competing priorities for analyst time; the impact is felt by employees as customer service frustration.

Employees express concerns regarding lack of clarity in knowing about and accessing the process, transparency regarding what happens once the process begins, and uncertainty in decision making regarding the outcomes. Managers exhibit inconsistent understanding how to support employees to understand the position study process and navigate appropriately, which is likely due to lack of standard training and communications. At times, employees access this process without their managers' knowledge.

While the position study process is the mechanism to ensure proper classification of job duties as assigned ongoing, many employees misinterpret this process as the mechanism to increase their pay. At times, pay increase is the outcome of the position study process; however, this is not always true. Employees need to understand the motivating factor to initiate a position study is not pay, rather substantial changes to their responsibilities have been assigned by their supervisor in an ongoing way.

Synthesis of Findings and Recommendations

A major focus on this equity analysis was to assess whether women and BIPOC employees had disparate outcomes due to the perception of potentially worse outcomes for those populations. The racial equity analysis found no worse outcomes for women and BIPOC employees; instead found negligible positive outcome differences. Within group comparison of the 53 non-white individuals and 255 women who accessed the process across the 8 year study period were slightly more likely to result in a reclassification.

Additionally, the inflow of compensation groups to the position study process varies and suggests there is a lack of general awareness about the position study process, especially among the compensation groups with field staff. Finally, many employees mistakenly interpret this process to be the mechanism to get a pay increase; this is only true when the outcome is a reclassification and an employee resides in the position.

Recommendations address the experience of employees and managers as two distinct audiences who experience the position study process separate from the HR staff who facilitate the study process.

Generally:

- Employees need access to on-demand learning materials that set appropriate expectations about what a position study process is and what it is not. Future knowledge sharing needs to account for employee access to email and computer.
- Managers need access to on-demand learning materials to support employees and themselves in navigating a position study process. Managers need to keep all position descriptions up to date.
- Human Resources staff need to improve customer service, enhance communications regarding study status, and develop the learning materials needed for City employees and managers.

A list of detailed findings and recommendations to address the above needs can be found throughout this report.

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Report Background

Key Terms with Definitions

The following key terms were identified to ensure language about the position study process is standard as a part of this equity analysis. Any words not already defined in the Personnel Rules will be reviewed for consideration to be included in the Personnel Rules update.

- **Bargaining Unit:** a body that represents a Compensation Group, which can be a formally recognized Labor Union or an informal Employee Association
- **Classification Specification:** is a written description of the general duties and responsibilities associated with a classification as well as the knowledge, skills, and abilities, education, training/experience, and necessary special qualifications required of employees holding positions within the classification
- **Compensation Group:** is a grouping of classifications identified by number and assigned to established salary ranges in the Compensation Plan. The groupings are generally based on shared attributes of the classifications, such as bargaining unit status, supervisory/ professional requirement status, department, or other commonalities.
- **Compensation Group Type:** a defined collection of compensation groups assigned to one of four categories
 - *Administration:* The set of Compensation Groups that have administrative support duties citywide, primarily found working in an office setting
 - *Executive:* The highest level Compensation Group of all employees in the hierarchy of staff citywide
 - *Field:* The set of Compensation Groups that are most typically found working out in our community, primarily away from a desk
 - *Professional:* The set of Compensation Groups that have technical subject matter expertise in a given area of City operations, primarily found working in an office setting
- **Incumbent:** an individual employee that holds a position at the City of Madison
- **Position:** a job
- **Position Study:** the process by which a position is reviewed to ensure the duties as assigned by a supervisor are consistent with the budgeted position's classification specification
- **Position Study Outcome:** the end result of the Position Study Process
 - **Denied:** HR determines the position is appropriately classified in the current state
 - **Reclassified:** HR determines the position is not appropriately classified in the current state, resulting in a change to the position's classification
 - **Withdrawn:** Individual outside HR chooses to end the position study process

NOTE: In the equity analysis conversations "position study" was used interchangeably at times with "compensation review" by a variety of city staff. These concepts are not synonyms which suggests the workforce in general may have misunderstanding about these two terms. A "compensation review" is typically done through a comprehensive Compensation Study of the entire workforce. The last compensation study was complete in the 1990s with the next set to begin in late 2023.

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City of Madison Workforce Context

Position Overview

To understand the equity analysis, this section is provided to give a high level overview of all positions at the City of Madison.

As of November 29, 2022, there were 3,060 active permanent positions at the City of Madison (Source: MUNIS Position Control Report). This does not include hourly positions citywide.

The following Table 1 includes a breakdown of the 3,060 positions by Compensation Group, including each Bargaining Unit.

Table 1.

Compensation Group Rollup	Bargaining Unit	Compensation Group (CG)		Description	Active Permanent Positions Citywide	Percent Positions by CG
Field	MPPOA	11	POLICE	Classifications in Police which are in the bargaining unit represented by the Madison Professional Police Officers Association (MPPOA)	448	14.6%
Professional	AMPS	12	POLICE SUPERVISORS	Supervisory classifications in Police which are in the organized unit represented by the Association of Madison Police Supervisors (AMPS)	37	1.2%
Field	IAFF	13	FIRE	Classifications in Fire which are in the bargaining unit represented by Fire Fighters Local 311	393	12.8%
Professional	AMFS	14	FIRE SUPERVISORS	Supervisory classifications in Fire which are in the organized unit represented by the Association of Madison Fire Supervisors (AMFS)	10	0.3%
Field	Local 236	15	CITY EMPLOYEES LOCAL 236	Field and technical positions within Engineering, Streets, Fleet Services, and Library maintenance	284	9.3%
Field	Local 6000	16	GENERAL	Field and technical positions throughout the City, except for those agencies covered by CG15	523	17.1%
Admin	MPSEA	17	NONREP CONFIDENTIAL	Clerical, administrative, and paraprofessional classifications which are confidential and/or supervisory throughout the City that are not represented.	1	0.0%
Professional	MPSEA	18	NONREP PROFESSIONAL SUPERVISOR	Professional, supervisory, and/or administrative/managerial that are non-represented, except for Librarians and City Attorneys	469	15.3%
Professional	MPSEA	19	NONREP NON CIVIL SERVICE	Non-civil service classifications which are salaried or have variable rates of pay.	11	0.4%
Admin	Local 6000	20	CLERICAL	Clerical, administrative, and paraprofessional positions throughout the City, except for Library, Metro, and CG17.	227	7.4%
Exec	Madison Municipal Executives	21	NONREP MANAGERS	The managerial compensation group (all Division and Department heads).	34	1.1%
Professional	MPSEA	23	ATTORNEY	Professional city attorneys.	15	0.5%
Field	IATSE	28	STAGEHANDS	Stagehands represented by IATSE Local 251.	0	0.0%
Admin	Local 6000	31	LIBRARY PAGES	Library Pages.	0	0.0%
Admin	Local 6000	32	LIBRARY	Clerical, administrative, and paraprofessional positions at the Library.	74	2.4%
Professional	MSPEA	33	LIBRARIANS	Professional librarians and other professional positions at the Library.	45	1.5%
Field	Local 695	41	TEAMSTER	Operations classifications at Metro which comprise the general bargaining unit of Teamsters Local 695.	399	13.0%
Admin	Local 695	42	TEAMSTER CLERICAL	Clerical, administrative, and paraprofessional classifications at Metro which comprise the office bargaining unit of Teamsters Local 695.	22	0.7%
Admin	MPSEA	43	METRO NONREP CONFIDENTIAL	Clerical, administrative, and paraprofessional classifications which are confidential and/or supervisory at Metro that are non-represented.	3	0.1%
Professional	MPSEA	44	METRO PROFESSIONAL SUPERVISORY	Professional, supervisory, and/or administrative/managerial classifications at Metro which are non-represented.	54	1.8%
Field	Local 6000	71	TRADES	Positions recognized as skilled trades workers.	11	0.4%
Field	Local 6000	83	CROSSING GUARDS	Crossing Guards.	0	0.0%
Grand Total					3060	100%

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Collapsing the Compensation Groups by the four Compensation Group Types (i.e. Admin, Exec, Field, and Professional), Table 2 shows that the majority of staff (67.3%) fall into the field category.

Table 2.

Compensation Group Type with Compensation Groups Listed	Total Active Permanent Positions Citywide	Percent Positions by Compensation Group
Admin	327	10.69%
CLERICAL	227	7.42%
LIBRARY	74	2.42%
METRO NONREP CONFIDENTIAL	3	0.10%
NONREP CONFIDENTIAL	1	0.03%
TEAMSTER CLERICAL	22	0.72%
Exec	34	1.11%
NONREP MANAGERS	34	1.11%
Field	2058	67.25%
CITY EMPLOYEES LOCAL 236	284	9.28%
FIRE	393	12.84%
GENERAL	523	17.09%
POLICE	448	14.64%
TEAMSTER	399	13.04%
TRADES	11	0.36%
Professional	641	20.95%
ATTORNEY	15	0.49%
FIRE SUPERVISORS	10	0.33%
LIBRARIANS	45	1.47%
METRO PROFESSIONAL SUPERVISORY	54	1.76%
NONREP NON CIVIL SERVICE	11	0.36%
NONREP PROFESSIONAL SUPERVISOR	469	15.33%
POLICE SUPERVISORS	37	1.21%
Grand Total	3060	100.00%

Demographic Snapshot

The Position Study Process is only accessible to permanent city employees. Here forward, we provide data on the individual employees who held permanent positions at the City of Madison at the time of this analysis. Of the 2,850 active permanent employees citywide as of October 13, 2022, the majority of the City of Madison workforce is White (78.3%) and Male (70.9%).

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Table 3.

Citywide Active Permanent Employee Demographics (From MUNIS as of 10-13-22)					
	Female	Male	Blank	Grand Total	Percent Total
A - ASIAN	33	57		90	3.2%
B - BLACK	69	191		260	9.1%
H - HISPANIC	38	123		161	5.6%
I - AMERICAN INDIAN	7	10		17	0.6%
O - OTHER RACE	24	50		74	2.6%
U - UNKNOWN		1		1	0.0%
W - CAUCASIAN	646	1585	1	2232	78.3%
Blank	11	4		15	0.5%
Grand Total	828	2021	1	2850	100.0%
Percent Total	29.1%	70.9%	0.0%	100.0%	

NOTE: Table 2. Does not include Public Health (i.e. Dane County Employees) or Pollworkers (i.e. Hourlies); Includes only Permanent Full-time & Part-time, Provisional Full-time & Part-time, Acting Full-time

Understanding the above Tables helps contextualize the data we know in the sections below.

Current State Position Study Process Map

For the purposes of the Equity Analysis, HR created a process map of the current state. This did not exist prior to the analysis. Recommendations resulting from this analysis include modifications to this current state map into a future state that addresses needs identified.

- Attachment 1. [Current State Process Map – Position Study](#)

The Current State Process Map is broken down into five phases:

- **Phase 1: Start Request Phase** – begins when someone in the Agency makes a request of HR regarding a vacant position, a “to-be created” position, or on behalf of an existing employee whose job duties as assigned by a supervisor may have changed to ensure those duties are consistent with the budgeted position’s classification specification.
- **Phase 2: Request Assignment Phase** – begins when HR receives the request to begin a position study.
- **Phase 3: Position Study Phase** – begins when the HR Manager assigns the position study to the appropriate HR Analyst to start the position study and ends when an outcome is decided and communicated to the Agency.
- **Phase 4: Outcome Proceedings Phase** – begins when a decision is issued by HR to the Agency if the decision to reclassify the position only; this phase does not occur when the decision is to deny or withdraw.
- **Phase 5: Appeal Phase** – begins when an employee of the position or Agency leadership disagree with HR’s decision (e.g. denial or question level of reclassification)

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Familiarize yourself with the process map before proceeding through the equity analysis for shared understanding of the current state.

Data Sources

The following data sources are used as key inputs to this project.

- **HR Services Position Study Dataset:** this excel dataset provided information on every position study request by agency dating back to 2009
- **MUNIS Employee File:** this dataset from our financial enterprise resource planning system provided demographic information for each City of Madison employee
- **MAC/WIC Survey Dataset:** the 2019 and 2022 datasets provided quantitative and qualitative information regarding city staff perspective on position study process and position description
- **Qualitative Interview Dataset:** the 2022 findings from approximately 20 qualitative interviews with individuals who went through a position study and anonymously volunteered feedback on their experience

Report Findings

The following sections discuss answers to the City of Madison's racial equity analysis questions.

What

What is the policy being analyzed and what does it seek to accomplish?

The position study policy and process is the subject of this analysis. The City of Madison position study policy and process is the mechanism to review work duties performed under supervisory guidance compared to the current position description and classification specification to ensure classification and compensation are appropriate compared to the level of work being performed ongoing.

A position study is available for the study of permanent positions only; this excludes hourly and limited term employment positions. A position may be held by an employee at the time of study (a.k.a. incumbent) or the position may be vacant. In order to understand demographic impacts of the process, this racial equity analysis studies the outcomes for those position studies complete with an incumbent. Some data is provided on timeliness to complete a position study when the position is vacant.

The goal of the position study equity analysis is to challenge all assumptions of the status quo (Section 4.B.3 of the City of Madison Personnel Rules, APM 2-4, classification change worksheets, etc.) and provide recommendations for policy and process changes to be considered for incorporation into the 2023 Personnel Rules update process.

What do available data tell you about this issue?

Overall:

- Most employees do not know about the position study process. Those who do know about the process often mistake a position study as the mechanism to increase their pay, which is only one possible outcome. Pay increases only occur when the position the individual holds has a significant change of job duties as assigned by the supervisor ongoing that exist outside of their existing classification. The position is then studied, and the decision outcome may be to reclassify resulting in an increase in pay.

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- Managers need access to on-demand learning materials to support employees and themselves in navigating a position study process. Managers need to keep all position descriptions up to date.
- Human Resources staff need to improve customer service and develop the learning materials needed for City employees and managers.

A detailed discussion of qualitative and quantitative findings are discussed below.

Data Analyzed and Limitations

HR staff cross matched the HR Services Position Study Dataset with the MUNIS Employee File to ensure gender and race/ethnicity were analyzed in this analysis. For reporting purposes, race/ethnicity are combined as one unit of analysis with the following categories: Asian, Black, Hispanic, American Indian, Other Race, Unknown, White. At times, this report refers Black, Indigenous, and People of Color (BIPOC) to discuss the Asian, Black, Hispanic, American Indian, Other Race, and Unknown race/ethnicity categories.

Age is not included in the current analysis; while age matters to best understand all demographic impacts of the position study process, time did not permit a retrospective calculation of age. Due to conversion of the City's Financial Enterprise Resource Planning system in 2015, demographic data is not available prior to this year, which shortens the analysis of the outcome period from 14 years of process data to 8 years of request and outcome data.

Finally, when a position study impacts more than one position (e.g. due to reorganization), we are unable to tell the total number of positions impacted. These are excluded from the analysis due to being unable to match demographics to the unknown individuals involved in the study.

MAC WIC Survey Findings

In 2019, the City of Madison's Multicultural Affairs Committee (MAC) and Women's Initiative Committee (WIC) completed the [2019 MAC WIC Survey Report](#). The response rate to the 2019 survey was 32% (n=913), with the majority of survey respondents being white (78%) and female (56%). In 2019, the total workforce was slightly more white (81% in 2019 compared to 78% in 2022) – showing signs of improved diversification in overall workforce demographics.

Related questions from the 2019 report related to the position study process and the associated findings are included below.

Finding 1: Of survey respondents who participated in the position study process, only half (49%) had a clear understanding of the process and even fewer (44%) were satisfied with the outcome (2019 MAC WIC Survey Report).

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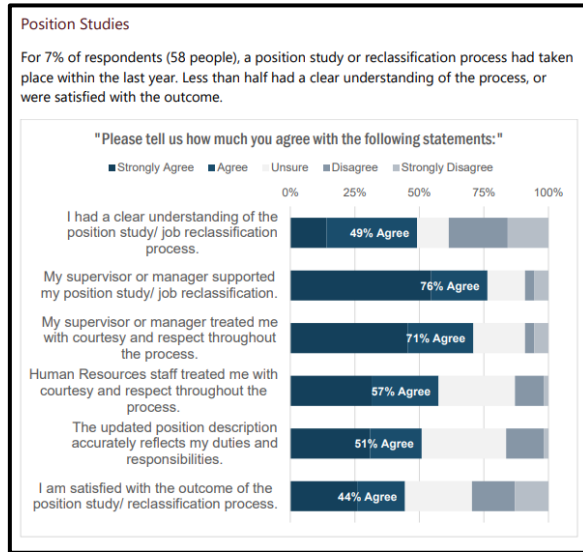


Chart 1.

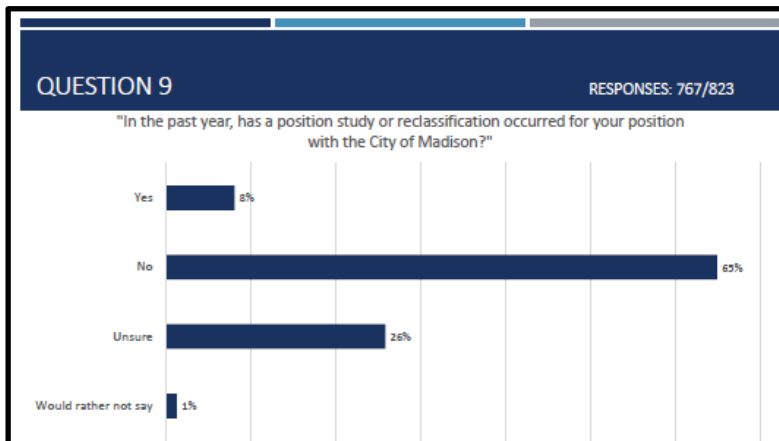
NOTE: Beware of response rate to this question

In 2022, MAC and WIC conducted a follow up survey of City staff. The response rate to the 2022 survey declined slightly to 29% (n=823).

Three questions from that survey related to the position study process and their findings are below.

Finding 2. The majority of 2022 MAC/WIC survey respondents (63%) did not have a position study in the past year. 26% of respondents were unsure, suggesting lack of awareness of this process among current employees (2022 MAC/WIC Survey Report).

Chart 2.



NOTE: Beware response rate.

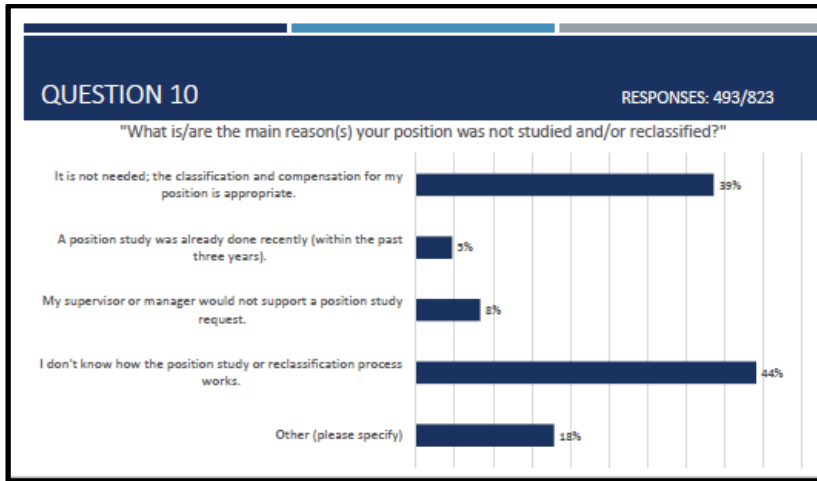
Finding 3. Many (44%) of survey respondents don't know how the position study process works. (2022 MAC/WIC Survey Report) Some feel their supervisor or manager would not support a position study (Qualitative Interviews).

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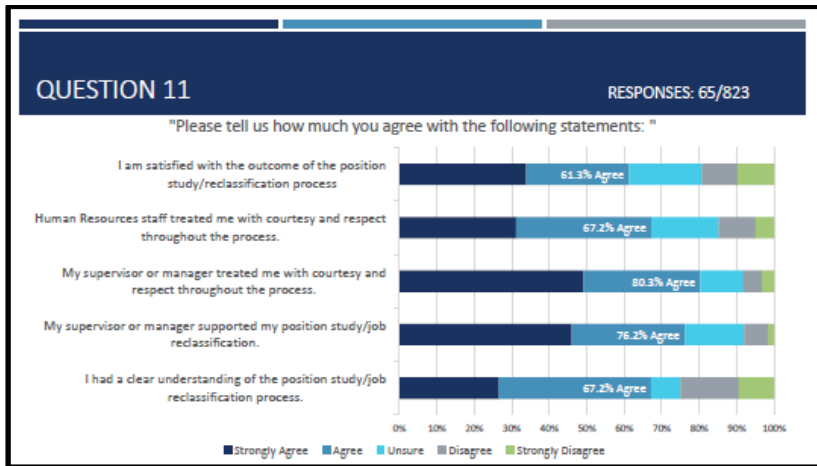
Chart 3.



NOTE: Beware response rate.

Finding 4. MAC/WIC data suggest there is room for improvement from HR in communication, customer service, and training around the position study process. (2022 MAC/WIC Survey Report)

Chart 4.



HR Position Study Dataset and Findings

The HR Position Study Dataset analyzed spanned January 2009 – September 2022. In the time period of the analysis, 735 unique study numbers exist impacting 843 positions, meaning a single position study can impact multiple positions. The dataset includes the positions studies that were withdrawn.

Of the 735 unique study numbers impacting 843 positions.

- 36% (n = 303) position studies were related specifically to positions that were either vacant at the time of request, newly created positions, or grouped (e.g. as part of an agency reorganization)

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- 64% (n = 540) were related to positions held by an incumbent at the time of request

The breakdown of position studies by Compensation Group follows:

Group Rollup	Comp Group	CG Description	# Positions Studies	% Total
Field	CG 13*	FIRE	1	0.2%
Field	CG 15	CITY EMPLOYEES LOCAL 236	13	2.4%
Field	CG 16	GENERAL	95	17.8%
Admin	CG 17	NONREP CONFIDENTIAL	34	6.4%
Professional	CG 18	NONREP PROFESSIONAL SUPERVISOR	214	40.0%
Professional	CG 19	NONREP NON CIVIL SERVICE	2	0.4%
Admin	CG 20	CLERICAL	130	24.3%
Exec	CG 21	NONREP MANAGERS	2	0.4%
Admin	CG 32	LIBRARY	12	2.2%
Professional	CG 33	LIBRARIANS	4	0.7%
Admin	CG 42*	TEAMSTER CLERICAL	12	2.2%
Admin	CG 43	METRO NONREP CONFIDENTIAL	1	0.2%
Professional	CG 44	METRO PROFESSIONAL SUPERVISORY	13	2.4%
Field	CG 71	TRADES	2	0.4%
	Grand Total		535	100.0%

NOTE: Of the 540 position studies with an incumbent, 5 were found to have incomplete information on file and are not included in the above table.

Finding 5. An average of 53 position studies are requested annually impacting an average of 60 positions per year. This means at times there is a one to many relationship between a single position study and the total number of positions impacted by the study.

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Table 4.

	Total Studies Requested	Total Positions Impacted	# Positions Vacant	# Positions with Incumbent
2009	49	56	25	31
2010	40	43	13	30
2011	50	64	20	44
2012	42	45	14	31
2013	53	62	19	43
2014	65	73	23	50
2015	61	61	28	33
2016	61	67	31	36
2017	72	79	25	54
2018	63	65	28	37
2019	46	51	26	25
2020	43	55	15	40
2021	43	69	17	52
2022	47	53	19	34
Grand Total	735	843	303	540

Finding 6. Time to complete a position study varies depending on the type of study (i.e. if there is an incumbent in the position or not). It takes HR longer to process a study when there is an incumbent.

HR stated their goal is to complete each position study within 90 days of a request. Of the 735 unique study numbers impacting 843 position studies, 730 had both a request date and an end date reported. The following table includes the average, range, and median days to complete compared to the goal.

Table 5.

Measure	All Data	Positions Vacant	Positions with Incumbent	Comparison to the Goal
Range of Days	1 Day – 743 Days	1-723 Days	1-743 Days	It depends on the study if HR meets the goal.
Average Days	104 Days	70 Days	124 Days	HR does not meet the goal.
Median Days	76 Days	46 Days	104 Days	HR meets the goal .

HR indicated the low end of the range of days (i.e. 1 day) exists when a position study request is received to add FTE or change FTE percentages to an existing position. The high end of the range

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exists due to appeals processes, delays due to leadership changes, and/or known agency reorganization consults impacting HR decision making timeliness.

The team discussed the mixed results when reviewing average to median days compared to the goal. While the average indicates HR does not meet the 90 day goal; median buffers noise of outliers in the dataset suggesting HR may be meeting the goal.

To dig in further, the team separated the data further to understand how incumbents within a position may experience HR's timeliness (i.e. compare position studies where the position is vacant to positions with incumbent).

Given average and median days meet the 90 day goal when positions are reviewed while vacant and the average and median exceed the 90 day goal when there is an incumbent in the position, the team discussed need to hold HR accountable to communicating about timeline delays. This is particularly important when an incumbent is in the position.

Finding 7. Compensation Group Type and demographic breakdown of the data matters to understand who feels empowered to initiate a position study.

Of the 540 position studies with an incumbent, 5 were found to have incomplete information on file (e.g. missing first and/or last name) and/or were no longer employed with the City (i.e. not in MUNIS and could not be accessed through the prior financial Enterprise Resources Planning software, SxD). These 5 are not included in the following analysis.

The report findings here forward focus on the outcomes of the 535 position studies (63% of all position study requests) where an incumbent held the position.

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Finding 8. The Compensation Group Types of the position studies requested compared the percent total of the workforce indicates Admin and Professional positions are being studied more often compared to Field counterparts.

Compensation Group Type	Position Study Count	Percent Total Positions Studies	Percent Total Workforce
Admin	189	35.3%	10.6%
Exec	2	0.4%	1.1%
Field	111	20.7%	67.6%
Professional	233	43.6%	20.8%
Total	535	100%	100%

A more detailed analysis of compensation groups shows which compensation groups could be targeted for outreach in follow up communications.

Representation by Comp Group (CG)	Compensation Group Types(s) A = Admin, E = Exec, F = Field, P = Professional	# Positions in CGs	# Position Studies
CG out of scope – union	13 – Fire 42 – Teamster Clerical	415	13
CG underrepresented in position study data	15 – City Employees Local 236 (F, Local 236) 21 – Nonrep Managers (E, Madison Municipal Exc) 32 – Library Admin Clerical (A, Local 6000) 33 – Librarians (P, MPSEA)	456	31
CG on par representation	16 – General (F, Local 6000) 19 – Nonrep Noncivil Service (P, MPSEA) 43 – Metro Nonrep Confidential (A, Nonrep) 71 – Trades (F, Local 6000)	578	100
CG overrepresented in position study data	17 – Nonrep Confidential (A, Nonrep) 18 – Nonrep Professional Supervisor (P, MPSEA) 20 – Clerical (A, Local 600) 44 – Metro Professional Supervisor (P, MPSEA)	759	391

Position Study Equity Analysis Report



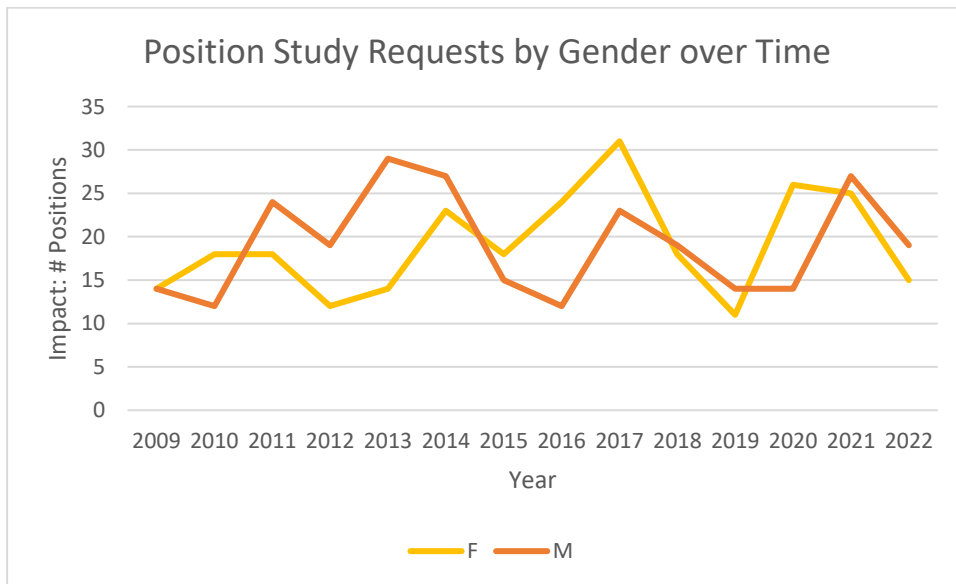
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Finding 9. Men and women request position studies at a similar rate; however, men represent a larger share of the City workforce.

Table 6.

Year	F	M	Grand Total
2009	14	14	28
2010	18	12	30
2011	18	24	42
2012	12	19	31
2013	14	29	43
2014	23	27	50
2015	18	15	33
2016	24	12	36
2017	31	23	54
2018	18	19	37
2019	11	14	25
2020	26	14	40
2021	25	27	52
2022	15	19	34
Grand Total	267	268	535
Percent Total	50%	50%	100%
2022 City Workforce	71%	29%	100%

Chart 5.



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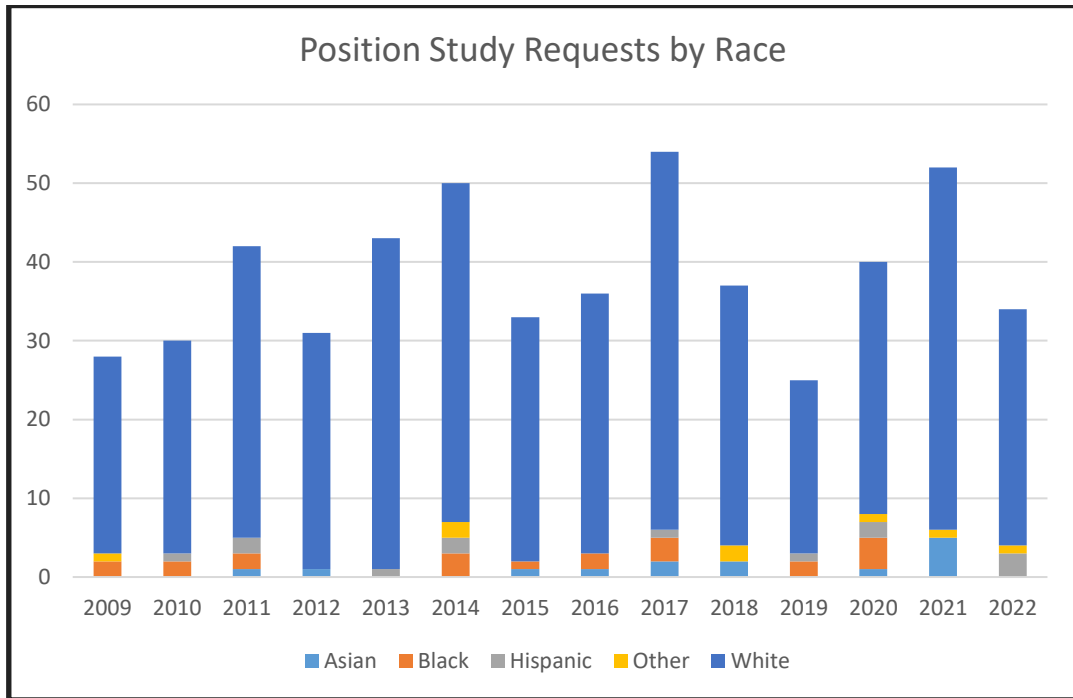
The equity analysis team discussed historic gender based pay gaps and significant advocacy efforts by the Women’s Initiative Committee, which may have contributed to these findings.

Finding 10. Black, Hispanic, American Indian and employees of other races request position studies less than their peer groups’ representation in the workforce; White employees request position studies more frequently than their peer group’s representation in the workforce.

Table 7.

	2022 Workforce	Study Request
A - ASIAN	3%	3%
B - BLACK	9%	4%
H - HISPANIC	6%	2%
I - AMERICAN INDIAN	1%	0%
O - OTHER RACE	3%	1%
W - CAUCASIAN	78%	90%

Chart 6.

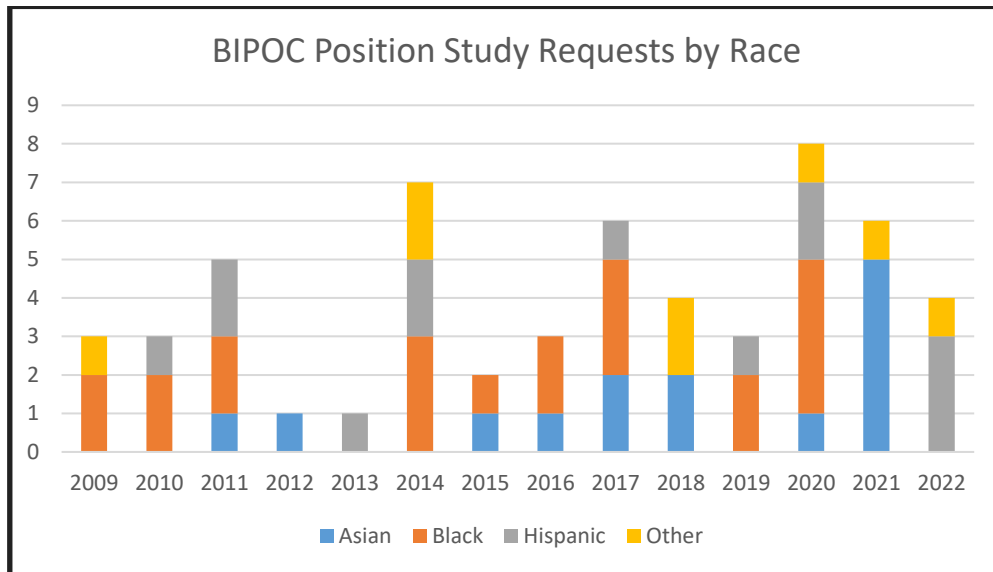


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Chart 7.



The equity analysis team discussed the absence of American Indian requests over time. In 2022, this racial demographic group represented 0.6% of the total City of Madison workforce (n=17). These position study request findings suggest need to improve hiring of BIPOC employees and increase communications to all employees.

Position Study Outcomes

There are six potential outcomes of a position study once initiated:

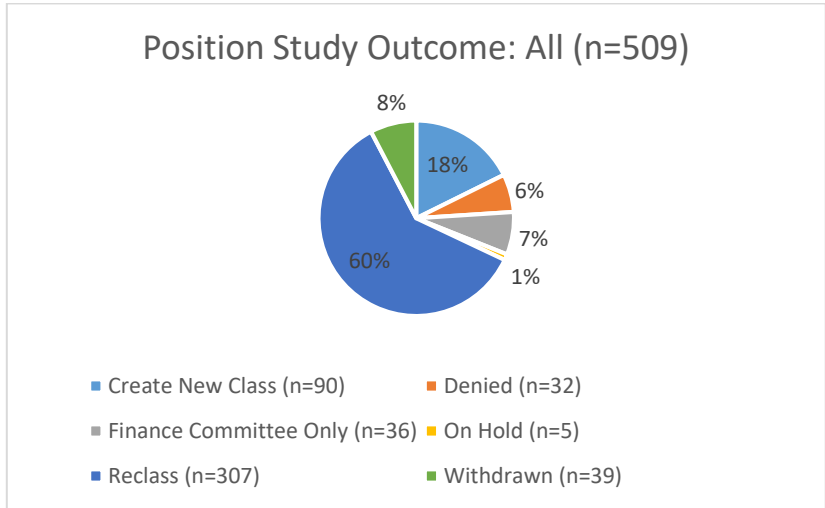
- **Create new class:** no current existing classification encompasses the work of the position study requested
- **Denied:** the position is appropriately classified, no reclassification required; position may not be studied again in the next three years
- **Finance Committee Only:** FTE percentage increases or FTE count of existing classification changes or recreating a vacant position in an existing classification
- **On hold:** agency put the study on hold
- **Reclassification:** aka reclass; the position is not appropriately classified in current classification, reclassification of the position is required
- **Withdrawn:** agency or individual withdrew study request

Of the 535 position studies initiated in the dataset where an incumbent employee was within the job, there are 509 with outcomes listed.

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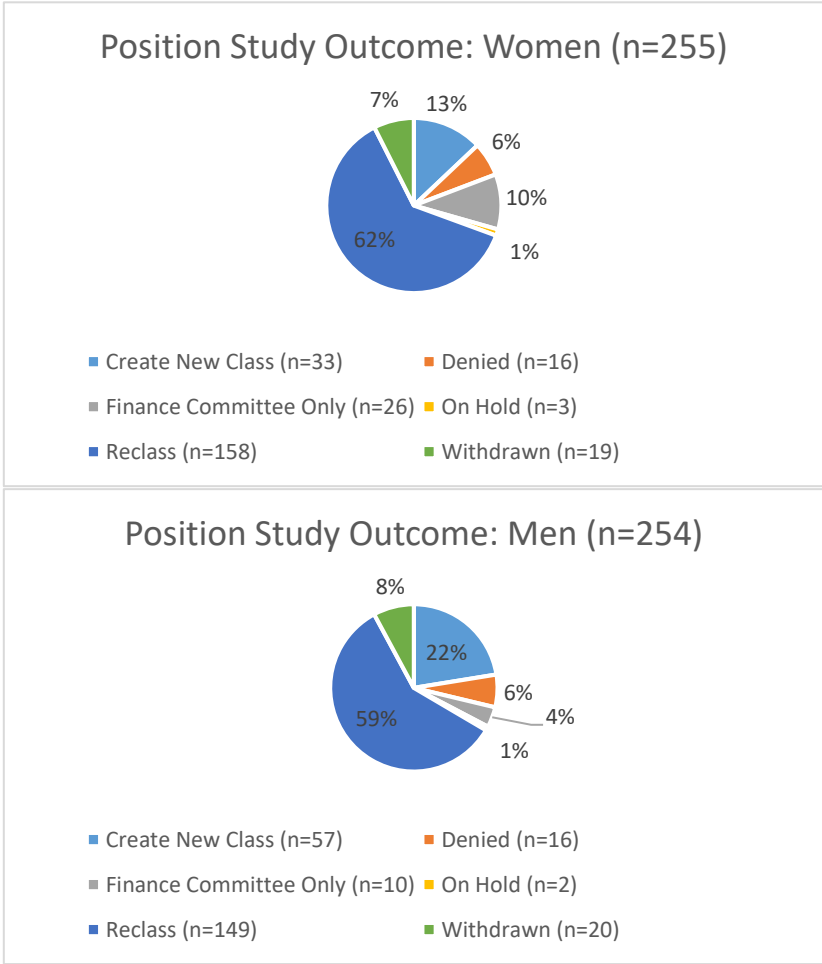
The majority of those position studies, 60% or n =307, result in a reclassification of an employee into a new classification. Recall, a reclassification is warranted when a position takes on new duties for a period of time under supervisory guidance which are expected to remain with that position ongoing. These new duties must be a significant change to the position as compared to the existing position description and necessitates a classification change because the new duties fall outside the scope of the current classification and reasonably compare to a higher level classification.

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Finding 11. Position study outcomes vary slightly by gender; positions held by women that go through this process result in a reclassification more often. NOTE: the number of positions held by women that went through this process in the 8 year study period is roughly equal to the number of men; however, men represent a larger share of the city workforce.

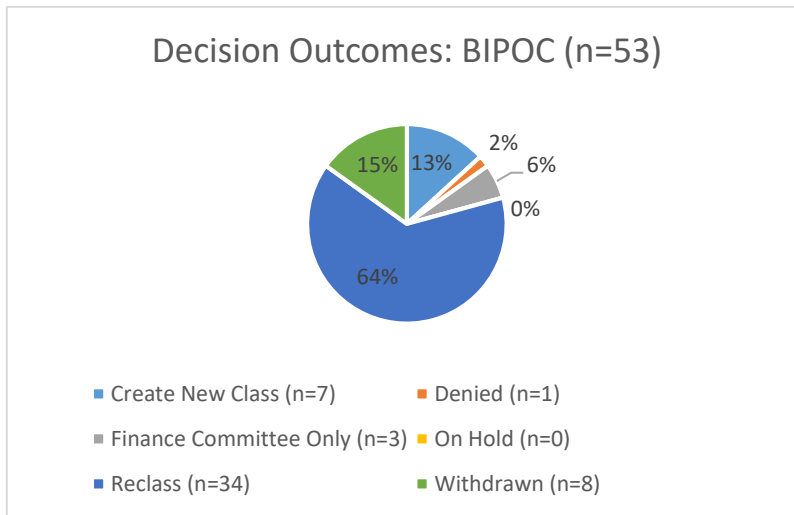
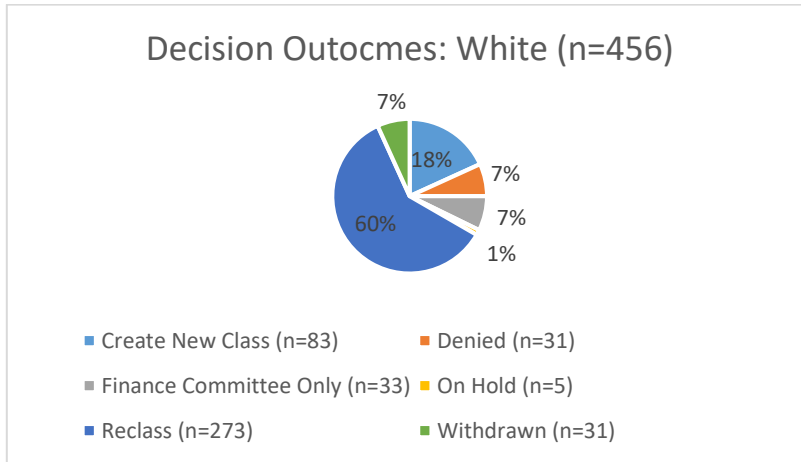


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Finding 12. Position study outcomes vary slightly by race; positions held by BIPOC that go through this process result in a reclassification more often as a percent total of within group comparison than positions held by white peers. NOTE: the number of positions held by BIPOC that went through this process in the 8 year study period with demographics is small, representing 10% of that dataset.



Finding 13. Appeal of a position study does not occur regularly. Of the 509 position studies with an outcome, 1% (n = 6) requested an appeal of the decision. All 6 appeals were made by white women.

Standard process dictates the HR Director makes the initial decision regarding an appeal. In the case of these six appeals, the HR Director determined:

- 4 appeals had merit (i.e. the work of the HR analyst was required to be re-reviewed)
- 1 appeal was denied (i.e. the work of the HR analyst was upheld)
- 1 appeal is under review (i.e. in process, waiting for a decision)

Of the 5 appeal decisions made by HR Director, all 5 were upheld by the Personnel Board (i.e. Personnel Board agreed with HR Director’s decision).

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What data are unavailable or missing?

A number of context factors by year were discussed by the Equity Analysis Team to support understanding time to complete a position study. This included citywide turnover by agency by year (i.e. number of people who leave the city each year) and the citywide requisitions by agency by year (i.e. recruitment volume); however, these were excluded in the analysis due to time constraints.

What factors (including existing policies and structures) associated with this issue might be affecting communities of color and/or low-income populations differently?

The issues of knowledge and perceived access to this process is affecting all employees across the organization. The burden is on the employee to understand if they are working outside of their current position classification and initiate a study request if they believe the duties as assigned ongoing place them into a higher position classification. This requires some knowledge of public service classification and compensation, which is not a job requirement of positions outside HR.

The common misperception of the position study process as the “reclass process” confounds this issue. Again, reclassification is only one potential outcome of a position study. Because a reclass results in a pay increase for an employee, this term has become popular slang among employees though needs to be course corrected in future communications. A position study is not a synonym for a reclassification (aka reclass).

Another factor impacting all employees is that they are required to have an up to date position description; however, centralized accountability for this information has been absent until this year. Under new leadership in HR directing the impending compensation study set to begin later this year, all positions must have an up to date position description on file with the central HR by the end of 2023. Since an up to date position description is one of the required documents to initiate a position study, this clean-up project will have multiple benefits for the organization and our employees.

Finally, the Equity Analysis Team discussed consideration that departments may be turning to the position study process to reimagine positions and their job duties given known budget constraints limit the ability to pursue new position creation. Agencies use the position study process to reimagine and recreate existing positions when there are directives imposed during times of budget constraints. This in turn limits an agency’s ability to (re)create new positions during the annual budget cycle. Currently, APM 2-4 explicitly states that this study process should not be used this way. Suggested changes to the APM are included in the recommendations section of this report.

Which focus area(s) will the policy primarily impact?

This policy primarily impacts government practices and employment with the City of Madison.

Who

The following section answers the Who section of the racial equity analysis.

Who could be impacted by the issues related to this policy, plan or proposal?

All permanent City of Madison employees may be impacted by this issue.

Who would benefit?

Benefits happen when you have knowledge, proper understanding, and access to the process. Individual permanent employees who take on new job duties ongoing under supervisory guidance, ask for a position study, and the outcome decision is to reclassify from the position benefit from this process. Staff with

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supportive leadership who know how to navigate the process may further benefit. Permanent employees who are in a career progression may also be more likely to benefit from the position study process because they have a clear career ladder to advance within.

Who would be burdened?

Employees who are non-union permanent staff or who are not aware this process exists may be burdened. Union employees have separate processes they go through and are not included in this process, which may feel like a burden to them. Employees who do not have progressions in their classification may be burdened without a clear pathway toward reclassification within the existing compensation system. Additionally, employees who experience a general lack of proper supervision or have a poor working relationships with their supervisors may also be burdened. Ultimately, employees who take on more good work are burdened with considering whether or not they feel worthy to self-advocate for a position study.

Supervisors and Agency Heads (i.e. Department and Division Heads) may be burdened by the financial resource planning that comes along with a position study. When a position study for an incumbent results in the position being reclassified, the resultant pay increase needs to be absorbed within the agency's budget. Supervisors and Agency Heads are also required to be knowledgeable about this process; however, past training was provided inconsistently as part of the Supervisory Academy where many HR topics were communicated in one session or not at all.

Additionally, the Budget Team may be burdened having to provide fiscal notes for these position studies knowing it is the Agency's responsibility to manage their budget to absorb the impact of initiating the position study in the first place. The fiscal impact of the position study is not proactively discussed between HR and the agency at this time. Budget Team enters this process after the decision by HR is already made and a resolution is entered into Legistar, initiating the formal approval process. There are opportunities to improve training materials to address the financial impacts of a position study.

HR staff are at times burdened by process backlogs and time to complete a position study among other competing priorities. Employees who are part of this process may also be burdened by HR staff communication styles; among the qualitative data gathered in our informational interview process, individuals felt being interviewed by different HR staff can lead to different outcomes. This suggest need for training to account for process standardization and controlling for potential biases among HR staff.

Are there potential disproportionate impacts on communities of color or low-income communities?

The results regarding the outcomes of the position study process suggest women and BIPOC may benefit from going through a position study.

From the 2022 MAC/WIC Survey, we also know the supervisor's role is key to supporting all employees, especially women and BIPOC. Relationship building, trust building, and, knowledge building regarding how additional existing processes such as the employee check in become a part of the mechanisms to improve the position study process and outcomes. For instance, the supervisor should be maintaining an up to date position description each year when they meet with individual staff at the employee check in. The supervisor must also recognize when assigning new and different duties to an existing position may impact the classification.

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Have stakeholders from different racial/ethnic and socioeconomic groups been informed, involved and represented in the process? Who is missing and how can they be engaged?

Qualitative data collection in 2022 by the equity analysis team included an open invitation to anyone in the city who underwent a position study and was part of the HR dataset. Additionally, a number of Agency Heads were interviewed qualitatively to better understand positional leaders' experience with the process. Quantitative data was collected through the MAC/WIC survey in 2019 and 2022. Individual employees who have not accessed the position study process are missing; they will be engaged in the communication of this report and future training efforts noted in the How recommendations section below.

What input have you received from those who would be impacted and how did you gather this information?

The Equity Analysis Team conducted a series of qualitative interviews by offering an interview or emailed input from individuals who went through a position study and were given an outcome decision.

Why

The following section answers the Why section of the equity analysis.

What are the root causes or factors creating any racial or social inequities associated with this issue?

(Examples: Bias in process; Lack of access or barriers; Lack of inclusive engagement)

Employee and supervisory knowledge of process are root causes of inequities. Supervisory support to enter the process may also lead to inequitable outcomes.

HR's transparency of the position study analysis process and results may lead to inequity. For example, it burdens the employee if they need to know the historical context of when the position was last studied. A savvy employee may ask, "When was my position last studied?" which matters given the current rules state a position will not be studied within three years without a significant material change. Most employees do not transparently know enough about this process to ask that question. If a denial is received as the result of a study, an employee may feel burdened by a perception of their work not being valued.

The Equity Analysis Team also discussed the nature of certain positions traditionally held by men and women have different pathways for advancement. Men often access field work that may be standard routine and repetitive; whereas, women are more often found in office or administrative roles which have more flexibility for growth and may lead to taking on more complex tasks over time more often. Despite more career movement, administrative roles have lower starting wages compared to field positions traditionally held by men. Additionally, the changing nature of positions with the onset of hybrid work environment and new technologies has led to inequities that are especially felt by field staff in particular.

Finally, the team considered how often all Agencies across the city are being asked to do more with less in a constrained fiscal environment. This environment gives people opportunity to work above their classification; however, people may not be paid accordingly. Work can be taken away from an individual and reassessed whether the support for a specific service is still needed at any point in time. A position study requires the job duties be reassigned ongoing under supervisory guidance. This disconnect is of concern, especially as the city tries to continue providing new and innovative services. A need exists for the evaluation of effective and efficient service delivery and what could be prioritized for changes within the budget needs of the city.

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What are potential unintended consequences? What benefits or burdens may result? (Specifically consider social, economic, health and environmental impacts.)

Potential unintended consequences include diminished mental and physical wellbeing regarding the fears and worries of whether a position study will result in a reclassification, strains on supervisor-employee relationships if employees do not receive the support they feel they deserve, and potential for organizational failure to retain high quality talent if the process and/or outcomes do not meet the needs of current employees. Employees may experience a financial benefit if the resulting decision is approved to reclassify the position. However, power to make final decisions rest in policy makers (e.g. Common Council, Executive Leadership, and Personnel Board) who aren't impacted by the policy decisions they make. They do not inherently understand how to take a policy decision through to implementation, which is the responsibility of staff who make the recommendations to the policy body. There are vocalized perceptions of inequity in "so and so gets, yet so and so didn't" highlighting relationships matter when people talk. This can lead to othering between agencies, especially when new hires come into the organization making more than counterparts in other agencies with similar credentials and different years of service.

What identified community (staff) needs are being met or ignored in the Position Study Process?

Staff needs being met:

- Economic: those who get through a position study process resulting in a reclassification get a pay increase
- Supportive Supervisors who approve staff position study: can create a safe space/workplace where employees can grow and thrive, shared understanding

Staff needs possibly being ignored:

- Gatekeeping supervisors who don't approve staff position studies:
 - Staff are advised to keep their position description up to date with or without a supervisor signature and document their work both work plans and associated tasks complete
- Labor unions who are not using this process, specifically Fire and Police unions.

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Where

Are there impacts on geographic areas (i.e. compensation group and agency in this case)?

Compensation groups vary as noted in Table X above.

Agencies vary across the 8 year study period.

Agency	Count Position Studies
(blank)	1
Assessor	6
Attorney	1
Building Inspection	6
CDA Housing	29
Civil Rights	22
Clerk	9
Common Council	3
Community Development	18
DPCED	4
DPCED Office of Director	4
EAP	2
Economic Development	11
Engineering	54
Finance	31
Fire	5
Fleet Services	5
Human Resources	19
Information Technology	26
Library	22
Mayor's Office	4
Metro Transit	25
Monona Terrace	28
Overture Center	2
Parking	11
Parks	19
Planning	17
Police	48
Streets	10
Traffic Engineering	32
Transportation	1
Treasurer	2
Water Utility	58
Total	535

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How

The following recommendations are provided as suggestions to incrementally improve the process as it exists today. However, the equity analysis team believes the process poses such substantial burdens on employees in the current state and advises reimagining the civil service system and compensation structure mechanisms as a whole when possible. Those considerations should be assessed as the full Personnel Rules are rewritten alongside the impending Compensation Study.

1. Improve HR customer service experience with the position study process.
 - a. We recommend the HR Services Team proactively treat a position study request in the same manner the Human Resources Employee and Labor Relations Team treats a disciplinary action as outlined by the [Grievances Timeline in the Employee Handbook](#) (See Page 30).
 - i. Specifically, within 5 business days from the receipt of a request for position study, the HR Analyst sends an email confirming receipt of request, notes any outstanding key documents, and lets the appropriate stakeholders know they will be hearing from us ongoing. Ideally a timeline is shared per Item 1.a.ii. below.
 1. Stakeholders included in messaging:
 - a. If the position is vacant, the position's Supervisor is the required stakeholder.
 - b. If the position involves an incumbent employee, the employee is additionally required.
 - c. The Agency Head will always be informationally included on communications.
 - d. The HR Analyst and HR Services Manager will determine the necessity for the HR Services Manager inclusion in this initial consult meeting.
 - ii. Before the initial email, a brief desk review will be conducted by the Human Resources Analyst and reviewed by the Human Resources Manager. If the Human Resources Analyst and Manager have determined the feasibility and approximate timeline for completion of the position study given competing priorities, that timeline will be shared. Timelines are clearly communicated whenever possible.
 - b. We recommend the Human Resources Services Team establish a brief survey to evaluate customer satisfaction with the position study process for ongoing continuous quality improvement.
 - i. Feedback survey would be sent within 5-10 business days after the close of a position study.
 - ii. Specifically, questions to be considered in the survey may include:
 1. Were you tread professionally and courteously?
 2. Did you receive regular communications?
 3. At the end of the decision, do you feel the analyst understood your job?
 4. Include an optional open ended opportunity to give feedback on challenges or successes with the process
 - iii. The HR Department will review the evaluation data at minimum annually and correct for concerns ongoing. Continuous improvement results will be reported in the HR Annual Report related to their Strategic Plan.
2. Improve communication both (a) internal to Agencies and (b) between Human Resources and the Agency requesting a position study.
 - a. We recommend Human Resources adopt an up to date glossary in the Personnel Rules to ensure all key terms as identified in this report are properly defined.

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- i. Where possible, streamline the following terms for increased clarity including but not limited to: Position Study, Classification Change, and Compensation Review, which are often used interchangeably though have distinct meanings. This process is about the work of the position.
 - b. We recommend the Human Resources Services Team establish a transparent, well-documented standard operating procedure related to the position study process that can be continuously improved with customer feedback over time.
 - i. Publish the process map developed during the equity analysis.
 1. If a position study comes in related to a reorg, consult budget analyst.
 - ii. Review the process map annually and improve over time where known issues surface from the customer satisfaction evaluation survey data.
 1. HR will ensure associations have opportunity to review substantive changes to the Position Study process ongoing.
 - iii. HR Services manager will designate a lead within the Team.
 - c. We recommend a new step be added to the process map prior to submission of a position study to occur internal to the Agency related to the classification change worksheet.
 - i. The Employee must meet with their Supervisor and/or Agency Head regarding the classification change worksheet and receive a denial from the Agency before they go directly to Human Resources with a request for a position study.
 - d. We recommend changes to the class change worksheet (both [filled](#) and [new](#)).
 - e. We recommend the Human Resources Services Team update the [Reclassification Process Employee net page](#) that builds off the [existing resources](#) related to position study process to include the process map, pre-recorded training materials (see Item 3 below), and all supportive resources and ongoing communications related to position studies.
3. Develop pre-recorded training materials that can be accessed on demand for two specific internal audiences (a) Agency leadership including Agency Heads and supervisors and (b) employees. All materials will be made accessible for employees that do not use computers.
 - a. Training for supervisors must be succinct content that follows adult learning best practices. We recommend Human Resources consider creating multiple modules of brief content that makes it easy to digest, just in time. At the point of onboarding, supervisors should be made aware of the location of these resources.
 - i. To support long range organizational planning, develop a checklist for supervisors to include reflection questions:
 1. When any position becomes vacant, supervisors stop and ask – does this positions need to be hired at the same level? (e.g. does an administrative clerk need to be upskilled to increase data analysis capacity across the organization)
 2. When supervisors are contemplating a position study with an incumbent in the position, stop and ask – can I rehire at this level if the position study leads to a higher classification?
 - b. Training for staff must also be succinct content that follows adult learning best practices and be made available for just in time use as needed.
4. Modify Section 4.B.3. of the City of Madison Human Resources Personnel Rules in the 2023 update cycle, APM 2-4, and the associated class change worksheets.
 - a. We recommend the Human Resources Services Manager consider the [two marked up version of proposed changes](#) to 4.B.3. to be discussed with the HR Director and Personnel Board for inclusion with the 2023 proposed changes.
 - i. The updated glossary of terms from the final equity analysis report are to be included.

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- b. We recommend the Human Resources Services Manager consider the marked up version of [APM 2-4](#) for consideration to be included in the updated resources when the Personnel Rule updates are issued.
- c. We recommend the Human Resources Services Manager include the marked up version of the classification change worksheets (both [filled](#) and [new](#)) for consideration to be included in the updated resources when the Personnel Rule updates are issued.
- d. We recommend the Human Resources Department conduct employee outreach on the [Results for America survey questions](#) drafted by the Organizational Development Team.

Attachments

Attachment 1. [Current State Process Map](#)

Attachment 2. [Future State Process Map](#)