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# Dr. Jeffrey Ling, CCP

## Project Principal

### Evergreen Solutions, LLC

Dr. Ling's experience includes human resources, strategic planning, research methodology, and change management. Dr. Ling has taught courses addressing human resources, research methodology, statistical analysis, and political economy at various universities. Similarly, he has planned, organized, and managed studies on human resources assessment, and government efficiency. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations.

#### **Education / Certifications**

Ph.D., Political Science, Florida State University, 1996  
M.S., Political Science, Florida State University, 1993  
B.A., Political Science, University of Tampa, 1990  
Certified Compensation Professional (CCP), 2016

#### **Professional and Business History**

Evergreen Solutions, LLC, Executive Vice President, August 2005 – present  
MGT of America, Inc., Partner, May 2004–July 2005; Principal, September 2000–April 2004; Senior Associate, November 1999–September 2000; Senior Consultant, April 1999–November 1999; Consultant, 1998–1999; Senior Analyst, May 1998–November 1998  
The College of Wooster, Assistant Professor, 1997–1998  
Iowa State University, Visiting Scholar, 1995–1997  
Florida State University, Research Assistant, 1992–1995  
Stinger Systems, Market Analyst, 1990–1992

#### **Selected Relevant Project Experience**

##### **Local Government and Public Sector Experience**

Project Principal of a Classification and Compensation Study for St. Charles County, Missouri  
Project Principal of a Compensation and Classification Study for Jefferson County, Missouri  
Project Principal of a Compensation and Classification Study for Clay County, Missouri

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**Project Principal of a Compensation Study for the City of Lee's Summit, Missouri**

**Project Principal of a Compensation and Classification Study for the City of Branson, Missouri**

**Project Principal of an Employee Satisfaction Survey for the City of Columbia, Missouri**

**Project Principal of a Performance Appraisal System for the City of Columbia, Missouri**

**Project Principal of a Classification and Compensation Study for Sedgwick County, Kansas**

**Project Principal of a Comprehensive Study of Positions within Pittsburgh City Government for the City of Pittsburgh, Pennsylvania**

**Project Principal of a Compensation Study for the County of Montgomery, Pennsylvania**

**Project Principal of a Gender and Race Equity Audit for the County of Allegheny, Pennsylvania**

**Project Principal of a Job Analysis Study of Public Safety Positions for the City of Kalamazoo, Michigan**

**Project Director of a Comprehensive Non-Union Pay and Classification Study for the City of Evanston, Illinois**

**Project Principal of a Salary Comparability Study for the Springfield Housing Authority, Illinois**

**Project Director of a Wage, Salary, and Comparability Study for the Peoria Housing Authority, Illinois**

**Project Principal of a Salary and Benefit Study for the City of Bloomington, Indiana**

**Project Principal of an Employee Classification and Compensation Study, Job Description Appraisals, and Update of Compensation Plan for the Lorain Metropolitan Housing Authority, Ohio**

**Project Principal of a Market Salary Survey for the Lorain Metropolitan Housing Authority, Ohio**

**Project Principal of a Compensation and Classification Study for the Central Ohio Transit Authority**

**Project Principal of an Employee Compensation and Classification Study for Mahoning County, Ohio**

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**Project Principal of an Employee Classification and Compensation Study for Blount County, Tennessee**

**Project Principal of a Salary Study for Davidson Metropolitan Transit Authority, Tennessee**

**Project Principal of a Compensation Salary Study Review for Davidson Transit Organization, Tennessee**

**Project Principal of a Consulting Services for a Job Evaluation/Wage Survey Analysis for the Fort Wayne-Allen Count Airport Authority, Indiana**

**Project Principal of a Salary and Benefits Study for the City of Bloomington, Indiana**

**Project Principal of a Job Classification and Compensation Study for the City of Albany, Oregon**

**Project Principal a Compensation Survey for the Texas City Management Association**

**Project Principal of a Compensation, Classification, and Benefits Study for Denton County, Texas**

**Project Principal of a Compensation and Classification Study for the Denton County Fresh Water Supply District, Texas**

**Project Principal of a Law Enforcement Compensation Study for Travis County, Texas**

**Project Principal of a Study to Assess and Improve the Information Technology Career Ladder for Travis County, Texas**

**Project Principal of a Compensation Market Review and Classification Study for the City of Austin, Texas**

**Project Principal of a Classification and Compensation Study for the City of Gonzales, Texas**

**Project Principal of a Classification and Compensation Study for the City of Athens, Texas**

**Project Principal of a Human Resources Management Study for the City of Sunset Valley, Texas**

**Project Principal of a Human Resources Department Assessment for the City of Buda, Texas**

**Project Principal of a Classification/Compensation Plan Update for the City of Temple, Texas**

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**Project Principal of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas**

**Project Principal of a Classification and Compensation Study for the City of Seguin, Texas**

**Project Principal of a Comprehensive Compensation and Benefits Study for the City of Sachse, Texas**

**Project Principal of a Pay and Classification Study for the City of Fredericksburg, Texas**

**Project Principal of a Comprehensive Compensation and Benefits Study for the City of Rowlett, Texas**

**Project Principal of a Classification and Compensation Study for the City of Pflugerville, Texas**

**Project Principal of Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, Texas**

**Project Principal of a Classification and Compensation Pay Plan for the City of Amarillo, Texas**

**Project Principal of Employee Compensation Consulting Services for Fort Bend County, Texas**

**Project Principal of a Pay for Performance Study and Salary Survey for the City of Mont Belvieu, Texas**

**Project Director of a Compensation and Classification Study for the Town of Little Elm, Texas**

**Project Principal of a Staffing and Efficiency Study for the Brazos River Authority, Texas**

**Project Principal of a Compensation and Classification Study for the Brazos River Authority, Texas**

**Project Principal of a Compensation and Classification Study and Organizational Review of the RSMU Department for Brazos River Authority, Texas**

**Project Principal of a Salary and Benefits Survey for Bexar Metropolitan Water District, Texas**

**Project Principal of a Classification and Compensation Study and Performance Evaluation System for the City of Santa Fe, New Mexico**

**Project Principal of a Compensation Study for the City of Carlsbad, New Mexico**

**Project Principal of a Compensation Study for the Town of Sahuarita, Arizona**

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**Project Principal of an Employee Satisfaction Survey for the Town of Gilbert, Arizona**

**Team Leader of a Disparity Study for Pima County and the City of Tucson, Arizona**

**Project Principal of a Comprehensive Management Review for the City of Fountain, Colorado**

**Project Principal of a Strategic Planning Study for the City of Fountain, Colorado**

**Project Principal of a Classification and Compensation Study for San Miguel County, Colorado**

**Project Principal of a Pay for Performance Study for the City of Manitou Springs, Colorado**

**Project Principal of a Classification, Compensation, and Benefits Survey for Kent County Levy Court, Delaware**

**Project Principal of a Classification and Compensation Plan Review for the City of Annapolis, Maryland**

**Project Principal of a Classification Desk Audit for the Tri-County Council for Southern Maryland**

**Project Principal of a Wages and Salary Scale Study for Washington County, Maryland**

**Project Principal of a Comprehensive Compensation Study for Allegany County, Maryland**

**Project Principal of a Salary and Benefits Review and Analysis for the City of Hyattsville, Maryland**

**Project Principal of a Wages and Salary Scale Study for Washington County, Maryland**

**Project Principal of a Compensation Analysis for the City of Hyattsville, Maryland**

**Project Director of a Classification and Compensation Study for Gloucester County, Virginia**

**Project Director of a Classification and Compensation Study for Montgomery County, Virginia**

**Project Principal of a Compensation Study for the County of York, Virginia**

**Project Principal of a Classification and Compensation Study for the City of Suffolk, Virginia**

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**Project Principal for a Compensation and Classification Study for Southeastern Public Service Authority, Virginia**

**Project Principal of a Job Analysis and Salary Evaluation of Sheriff's Office Positions for the City of Newport News, Virginia**

**Project Principal of a Classification and Compensation Study for the City of Fredericksburg, Virginia**

**Project Director of a Classification and Compensation Study for the County of Culpeper, Virginia**

**Project Director of a Classification and Compensation Study for the Loudoun County, Virginia**

**Project Principal of a Compensation Study for King George County, Virginia**

**Project Principal of a Pay and Classification Study for the District 19 Community Services Board, Virginia**

**Technical Advisor of a Classification, Compensation, and Benefits Study for Spotsylvania County, Virginia**

**Project Principal of a Pay and Classification Study for the City of Williamsburg, Virginia**

**Project Principal of a Classification and Compensation Study for Essex County, Virginia**

**Project Principal of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia**

**Project Principal of a Pay and Classification Study for the Isle of Wight County, Virginia**

**Project Principal of a Salary Market Study and Personnel Systems Study for Virginia's Region 2000 Local Government Council**

**Project Principal of a Salary Comparability Study and Assessment of Pay-for-Performance Systems for the Housing Authority of the City of Winston-Salem, North Carolina**

**Project Director of a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, North Carolina**

**Assistant Project Director of an Operational Review for the Duplin County Board of County Commissioners, North Carolina**

**Project Principal of a Position Classification and Compensation Study for Gaston County, North Carolina**

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**Project Principal of a Compensation and Classification Study for Union County, North Carolina**

**Project Consultant of a Performance Audit of Lee County Government, North Carolina**

**Assistant Project Director of a Performance Audit for the County of Davie, North Carolina**

**Project Director of a Salary Equity Study for Guilford County, North Carolina**

**Project Principal of Classification and Compensation Study and Benefit Survey for Cape Fear Public Utility Authority, North Carolina**

**Project Principal of a Compensation and Classification Study for the City of Wilmington Housing Authority, North Carolina**

**Project Principal of a Classification and Compensation Study for the Richland Library, South Carolina**

**Project Principal of a Classification and Compensation Study for the City of Goose Creek, South Carolina**

**Project Director of a Compensation Study for the City of Chester, South Carolina**

**Project Director of a Classification and Compensation Study for the City of Lancaster, South Carolina**

**Project Principal of a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, South Carolina**

**Project Principal of a Wage and Compensation Study for the Town of Mount Pleasant, South Carolina**

**Project Principal of a Compensation, Classification, and Performance Appraisal Study for the Spartanburg Housing Authority, South Carolina**

**Project Principal of an Employee Evaluation System for the North Charleston Sewer District, South Carolina**

**Project Principal of a Classification and Compensation Study for the Town of Hilton Head Island, South Carolina**

**Project Principal of a Compensation and Classification Study for Charleston County Park and Recreation Commission, South Carolina**

**Project Principal of a Compensation and Classification Study for City of Mauldin, South Carolina**

**Project Principal of a Classification and Compensation Study for the City of Goose Creek, South Carolina**

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**Project Principal of a Wage and Compensation Study for the Town of Mount Pleasant, South Carolina**

**Project Director of a Classification and Compensation Study for the Municipal Association of South Carolina**

**Project Consultant of a Classification and Compensation Study for the Berkeley-Charleston-Dorchester Council of Governments, South Carolina**

**Project Principal of a Parity Study for Charleston County, South Carolina**

**Project Director of a Structural and Compensation Systems Study for Charleston County, South Carolina**

**Project Principal of a Classification and Compensation Study for Berkeley County, South Carolina**

**Project Principal of a Classification and Compensation Study for Dorchester County, South Carolina**

**Project Principal of a Salary Study and Position Descriptions for the Mississippi Regional Housing Authority, No. VII**

**Project Director of the Development and Monitoring of an Affirmative Action Plan for the District of Columbia Water and Sewer Authority**

**Project Principal of a Departmental Job Analysis, Classification, and Efficiency Study for Town of Colchester, Vermont**

**Project Principal of a Compensation Study for the Chittenden County Regional Planning Commission, Vermont**

**Project Director for Community Visioning and Strategic Planning for the Town of Colchester, Vermont**

**Project Principal of a Classification and Compensation Study for Rhode Island Housing**

**Project Principal of a Comprehensive Employee Study for the Ft. Pierce Housing Authority, Florida**

**Project Principal of a Classification and Compensation Study for the Tampa Housing Authority, Florida**

**Project Director of a Compensation Trends Survey and Benefits Survey for the Tampa Bay Water Authority, Florida**

**Project Principal of a Compensation Study for the Hillsborough Area Transit Authority, Florida**

**Project Principal of a Market Salary Survey for the Peace River Manasota Regional Water Supply Authority, Florida**



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**Project Director of a Markey Salary Study Update for Manatee County, Florida**

**Project Principal of a Comprehensive Classification and Compensation Study (IT positions) for Manatee County, Florida**

**Project Principal of a Classification and Compensation Study for Pinellas County, Florida**

**Project Principal of a Job Classification and Compensation Study for Escambia County, Florida**

**Project Principal of a Compensation and Classification Study for Alachua County, Florida**

**Project Principal of a Compensation, Classification and Performance Management Study for Manatee County, Florida**

**Project Principal of a Compensation Study and Pay for Performance System for Clay County Sheriff's Office, Florida**

**Project Principal of a Compensation and Classification Study for the Alachua County Sheriff's Office, Florida**

**Project Principal of Job Audits for the City of Gainesville, Florida**

**Project Principal of a Compensation Analysis for the City of Orange City, Florida**

**Project Principal of a Compensation and Classification Study for the Martin County Sheriff's Office, Florida**

**Project Principal of a Salary Survey for Pasco County Sheriff's Office, Florida**

**Project Principal of a Salary Survey for the Marion County Sheriff's Office, Florida**

**Project Principal of a Compensation Study for the Nassau County Sheriff's Office, Florida**

**Project Principal of a Human Resource Audit for the Okaloosa County Sheriff's Office, Florida**

**Project Principal of a Salary and Benefits Study for the Seacoast Utility Authority, Florida**

**Project Principal of a Compensation and Classification Study for WorkNet Pinellas, Florida**

**Project Principal of a Wage, Salary, and Compensation Study for the Pinellas County Housing Authority, Florida**

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**Project Principal of a Compensation Survey for CareerSource Pinellas, Florida**

**Project Principal of a Classification and Compensation Study for the Town of Cutler Bay, Florida**

**Project Principal of a Compensation and Classification Study for the Town of Davie, Florida**

**Project Principal of a Pay and Classification Study for Gulf County, Florida**

**Project Principal of a Classification and Compensation Study for the City of Sunny Isles Beach, Florida**

**Project Principal of a Compensation and Classification Study for the City of Clermont, Florida**

**Project Principal of a Compensation Study for the City of Winter Park, Florida**

**Project Principal of Classification and Compensation Services for the City of Dunedin, Florida**

**Project Principal of a Classification and Compensation Study for the City of Zephyrhills, Florida**

**Project Principal of a Job Classification Analysis for the City of St. Petersburg, Florida**

**Project Principal of Compensation Consultant Services for the City of Coral Springs, Florida**

**Project Principal of a Classification and Compensation Study for the City of Sebring, Florida**

**Project Principal of a Salary Study for Highlands County, Florida**

**Project Director of a Compensation and Classification Analysis for the City of Pinecrest, Florida**

**Project Principal of an Executive Compensation Study for the Health Care District of Palm Beach County, Florida**

**Project Director of a Market Salary Survey for the Solid Waste Authority of Palm Beach County, Florida**

**Project Director of a Critical Classification Analysis and an Executive Compensation Analysis for the Health Care District of Palm Beach County, Florida**

**Project Principal of a Compensation Study for the Manatee County Sheriff's Office, Florida**

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**Project Principal of Compensation and Classification Systems Consulting Services for the Collier County Sheriff's Office, Florida**

**Project Principal of a Classification and Compensation Study and Merit Pay System Development for Keys Energy Services, Florida**

**Project Director of a Salary Analysis for Manatee County Utility, Florida**

**Project Principal of a Performance Management Study for the Palm Beach County Clerk and Comptroller's Office, Florida**

**Project Principal of a Salary, Benefit and Position Reclassification Study for the City of Kissimmee, Florida**

**Project Principal of a Salary and Benefits Study for the City of Ocala, Florida**

**Project Principal of a Salary, Benefit and Position Reclassification Study for the City of St. Cloud, Florida**

**Project Principal of a Compensation and Classification Study for the City of Bunnell, Florida**

**Project Principal of a Compensation Study for the City of Bushnell, Florida**

**Project Principal of an Executive Compensation Study for the Palm Beach County Health Care District, Florida**

**Project Principal of a Market Salary Survey for the Peace River Manasota Regional Water Supply Authority, Florida**

**Project Principal of a Human Resources Performance Review for the City of Cape Coral, Florida**

**Project Principal of a Compensation and Classification Study for the City of Deltona, Florida**

**Project Principal of a Performance Improvement Training and Study for the City of Destin, Florida**

**Project Director of a Comprehensive Compensation and Classification Study for the City of Panama City, Florida**

**Project Principal of a Pay and Classification Study for the City of Fort Walton Beach, Florida**

**Project Principal of a Classification, Compensation, and Staffing Study for the City of Lake City, Florida**

**Project Principal of a Classification and Compensation Study for the City of Lake City, Florida**

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**Project Director of a Comprehensive Compensation and Benefits Analysis for the City of Bartow, Florida**

**Project Principal of a Compensation Survey for the City of Tamarac, Florida**

**Project Principal of a Compensation and Classification Study for the City of Delray Beach, Florida**

**Project Principal of a Compensation Study for the City of Key West, Florida**

**Project Principal of a Salary Survey for the City of Kissimmee, Florida**

**Project Principal of a Salary Survey for the City of Temple Terrace, Florida**

**Project Principal of a Compensation Study for the Town of Juno Beach, Florida**

**Project Director of a Job Analysis and Description Development for the Town of Palm Beach, Florida**

**Project Director of a Classification, Compensation, and Benefits Study for the City of Palm Beach Gardens, Florida**

**Project Director of a Compensation Study for the City of Hollywood, Florida**

**Project Principal of a Classification and Compensation Study for the City of Sarasota, Florida**

**Project Principal of a Compensation Study for Sarasota County, Florida**

**Project Principal of Classification and Compensation Services for the City of Dunedin, Florida**

**Project Principal of a Staffing, Compensation and Classification Study for the Town of Ponce Inlet, Florida**

**Project Principal of Salary Survey (Compensation Plan Update) for the Town of Ponce Inlet, Florida**

**Project Principal of a Classification, Compensation, and Benefits Study for the Town of Jupiter, Florida**

**Project Principal of a Classification and Compensation Study for the Village of Islamorada, Florida**

**Project Principal of a Compensation, Classification, and Value Engineering Analysis for City of Doral, Florida**

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**Project Principal of a Benchmark Compensation Study for the City of Plantation, Florida**

**Project Principal of a Police Force Compensation and Benefits Study for the City of Doral, Florida**

**Project Principal of a Compensation Analysis for the City of Holmes Beach, Florida**

**Project Principal of a Classification and Compensation Study for the City of Ft. Myers, Florida**

**Project Principal of a Classification and Compensation Study for the City of Zephyrhills, Florida**

**Project Principal of a Classification and Compensation Study for the City of Destin, Florida**

**Project Principal of a Compensation Study for Lake County, Florida**

**Project Principal of a Classification and Compensation Study for the Health Care District of Palm Beach County, Florida**

**Project Principal of an Organizational Review for the Health Care District of Palm Beach County, Florida**

**Project Principal of a Strategic Planning Study for the Health Care District of Palm Beach County, Florida**

**Project Principal of a Merit Based Performance Management System for the Health Care District of Palm Beach County, Florida**

**Project Principal of an Employee Engagement Study for the Health Care District of Palm Beach County, Florida**

**Project Principal of a Compensation Study for Glades General Hospital, Florida**

**Project Principal of a Compensation Market Analysis for the St. Johns River Water Management District, Florida**

**Project Principal of a Total Compensation Study for the Southwest Florida Water Management District**

**Project Principal of a Salary, Benefit and Position Reclassification Study for the Toho Water Authority, Florida**

**Project Principal of a Pay and Classification Study for Tampa Bay Water, Florida**

**Project Principal of a Position and Compensation Study for the Florida Keys Aqueduct Authority**

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**Project Principal of a Compensation and Classification Study for the Ft. Pierce Utilities Authority, Florida**

**Project Principal of a Software Training Services for Seminole County, Florida**

**Project Principal of a Compensation and Classification Study for Seminole County, Florida**

**Project Principal of a Compensation and Benefits Study for Seminole County, Florida**

**Project Principal of a Performance Management Study for Seminole County, Florida**

**Project Principal of a Compensation and Classification Study for Gadsden County, Florida**

**Project Principal of a Compensation and Classification Study for Monroe County and Monroe County Sheriff's Office, Florida**

**Project Principal of a Market Salary Survey for Charlotte County, Florida**

**Project Principal of a Pay and Classification Study for Martin County, Florida**

**Project Principal of a Comprehensive Classification and Compensation Study for Bay County, Florida**

**Project Principal of a Classification and Performance Management System Review for Citrus County, Florida**

**Project Director of Management Consulting Services for Osceola County, Florida**

**Project Principal of a Compensation Study for Osceola County, Florida**

**Project Principal of a Compensation Survey for Miami-Dade County, Florida**

**Project Principal of an Employee Engagement Survey for the City of Daytona Beach, Florida**

**Project Principal of a Compensation Study for the City of North Miami Beach, Florida**

**Project Principal of an Employee Total Compensation Study for the Loxahatchee River District, Florida**

**Project Principal of a Benefits Study for the Lakewood Ranch Inter-District Authority, Florida**

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**Project Principal of a Compensation and Classification Study for the Orlando-Orange County Expressway Authority, Florida**

**Project Principal of an Emergency Management Operations Survey for the City of Orlando, Florida**

**Project Principal of Human Resource Consulting Services to the City of Orlando, Florida**

**Project Principal of a Pay and Classification Study for the City of Holly Hill, Florida**

**Project Principal of a Classification and Compensation Study for the City of High Springs, Florida**

**Project Principal of a Compensation and Classification Study for the City of North Port, Florida**

**Project Principal of a Job Classification and Compensation Study for the City of Sunrise, Florida**

**Project Principal of a Compensation Study for the Alabama League of Cities**

**Project Director of a Classification and Compensation Study for Lumpkin County, Georgia**

**Project Principal of a Compensation and Benefits Survey for Forsyth County, Georgia**

**Project Principal of a Classification and Compensation Study and Analysis for Douglas County, Georgia**

**Project Principal of a Comprehensive Classification and Compensation Study for the City of Garden City, Georgia**

**Project Principal of a Compensation Plan Update for the City of Garden City, Georgia**

**Project Principal of a Pay and Classification Study for the City of Chamblee, Georgia**

**Project Principal of a Compensation Analysis for the City of Alpharetta, Georgia**

**Project Principal of an Employee Classification and Compensation Study for the City of Savannah, Georgia**

**Project Principal of a Classification and Compensation Study and Analysis for the City of Douglasville, Georgia**

**Project Principal of a Compensation Study for the City of Statesboro, Georgia**

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**Project Principal of Pay for Performance Appraisal Consultant Services  
Project for the City of Riverdale, Georgia**

**Project Principal of a Salary and Benefits Survey for the City of  
Roswell, Georgia**

**Project Principal of a Classification and Compensation Study for the  
City of Kingsland, Georgia**

**Project Principal of a Compensation and Benefits Study and Analysis  
for the City of Dahlonega, Georgia**

**Project Principal of a Comprehensive Compensation and Classification  
Study for the City of Tybee Island, Georgia**

**Project Principal of a Compensation and Classification Study for the  
City of Brookhaven, Georgia**

## **Presentations**

**American Political Science Association  
International Personnel Management Association  
Florida State Personnel Association  
Florida Professional Association for Human Resources  
Florida Public Human Resources Association, Inc  
National Association of State Personnel Executives  
Florida Government Technology Conference  
Florida Government Information Services Association  
Georgia Board of Health Conference  
National Association of Workforce Boards  
Kansas Public Personnel Conference  
Texas County Leadership Institute  
Workforce Planning for the 21st Century**



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**Ms. Queenell G. Fox, SHRM-SCP,  
IPMA-SCP, SPHR, PHR**  
Project Director  
Evergreen Solutions, LLC

Ms. Fox is an executive human resources professional with a proven track record of success in achieving organizational objectives by utilizing strategic HR initiatives to meet organizational needs. Demonstrated strong communications, interpersonal relations, coaching, counseling and conflict resolution skills and thorough knowledge of employment laws, regulations and HR best practices.

**Education**

Bachelor of Science in Human Resource Management, Barry University, Florida

Associate of Arts in Business Administration, Enterprise-Ozark College, Alabama

M.B.A. Coursework, Columbia

Paralegal Certification, Coastal Georgia

**Certifications**

SPHR - Senior Professional in Human Resources

(SHRM-SCP) - Society for Human Resources Management, Senior Certified Professional

(IPMA-SCP) - International Public Management Association, Senior Certified Professional

(PHR) - Professional in Human Resource Management

**Affiliations/  
Memberships**

Texas Municipal Human Resources Association  
Texas Public Employers Labor Relations Association  
Texas Bay Area Society for Human Resources Association  
International Public Management Association in Human Resources  
Department of Management Services Executive Cyber Information Response Team  
Department of Management ADA, Safety and EEO Advisory Boards  
Tallahassee Community College Career Center Advisory Board  
Florida Professional Association for Human Resources  
Human Resources Florida, State Council Core Leader, SHRM Foundation Chairperson

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Big Bend Society for Human Resource Management (BBSHRM)  
Society Human Resource Management (SHRM)  
International Public Management Association for Human  
Resources (IPMA-HR)  
Employers Representative, Tallahassee Mayor's Economic Summit  
Partner Development Task Force

**Professional  
and Business  
History**

**Evergreen Solutions, LLC, Manager, December 2016 - Present**

Project Director of a Compensation and Classification Study for Clay  
County, Missouri

Project Director of an Employee Compensation and Classification  
Study for Mahoning County, Ohio

Project Director of a Salary Comparability Study for the Springfield  
Housing Authority, Illinois

Project Director of a Classification and Compensation Study for  
Greensville County and Greensville County Water and Sewer  
Authority, Virginia

Project Director of a Classification and Compensation Study of  
Surry County and Surry County Social Services, Virginia

Project Director of a Compensation and Classification Study for  
Prince George County, Virginia

Project Director of a Pay and Classification Study for Dorchester  
County, South Carolina

Project Director of a Classification and Compensation Study and  
Analysis for the Town of Cheraw, South Carolina

Project Director of a Salary Comparability Study for the Housing  
Authority of Florence, South Carolina

Project Director of a Classification and Compensation Study for the  
City of Athens, Texas

Project Director of a Classification and Compensation Study for the  
City of Gonzales, Texas

Project Director of a Classification and Compensation Plan Update  
(Included Review of Performance Appraisal System) for the City of  
Temple, Texas

Project Director of a Comprehensive Classification and  
Compensation Analysis for the Barton Springs/Edwards Aquifer  
Conservation District, Texas

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**Project Director of an Efficiency Study of the Clerk's Office for the City of Pensacola, Florida**

**Project Director of a Job Classification and Compensation Study for Escambia County, Florida**

**Project Director of a Salary and Benefits Study for the Seacoast Utility Authority, Florida**

**Project Director of a Classification and Compensation Study for the Sarasota Bay Estuary Program, Florida**

**Project Director of the Implementation of a Living Wage for Monroe County, Florida**

**Project Director of a Classification Study for the City of High Springs, Florida**

**Project Director of a Classification and Compensation Study for the City of Dania Beach, Florida**

**Project Director of a Compensation Analysis for the City of Orange City, Florida**

**Project Director of a Job Classification and Compensation Study for the City of Melbourne, Florida**

**Project Director of a Pay and Classification Study for the City of Holly Hill, Florida**

**Project Director of a Pay and Classification Study for the Lake County Sheriff's Office, Florida**

**Project Director of a Classification and Compensation Study for the Pasco County Sheriff's Office, Florida**

**Project Director a Compensation Study for the Bay County Sheriff's Office, Florida**

**Director of Human Resources & Civil Service, City of League City, League City, TX, January 2014 -2016**

**A trusted member and advisor to the City's Executive Team, Mayor and City Council and employees that resulted in substantial, positive organizational changes to the City by developing, implementing, promoting, and sustaining a culture of continuous improvement, high professional ethics, collaboration, compliance, and commitment.**

- **Revised and updated employee handbook to ensure current laws and best practices were incorporated and to ensure legal compliance and best practices were in place for a growing city.**

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- Restructured hiring and recruiting processes to ensure updated job descriptions, salary analysis and department's budget allocations were in place prior job vacancy recruiting.
  - Streamlined and organized scanning of personnel files and documents into the document storage system, Laserfische.
  - As Civil Service Director, forged a trusted and collaborative working relationship with Chief and Assistant Chief of Police and other members of the department to revise and update Local Rules, successful mediations and ongoing efforts to bring about positive change to the department.
  - Through collaboration, effective listening, open minded efforts and flexible forged a great working relationship with long tenured managers and to find resolutions to staffing and employee relations challenges.
  - Successfully recruited and hired seven senior managers.
  - Developed and identified second and third tier managers for all departments.
  - Created "League City's Rising Star" training program to enhance skills for second and third level managers in the City's succession program.
  - Revamped and modified annual evaluation system to ensure ongoing performance conversations, corrective actions or accolades take place all year long to support effective performance reviews.
  - Successfully negotiated benefits and windstorm and hail consulting contracts that provided the City with better coverage and a reduced cost in premiums.
  - Reduced City's unemployment and workers compensation expenses by challenging UI claims and implementing return to work strategies for workers compensation cases.
  - Established a trusted relationship with employees at all levels within the organization.

**Chief Personnel Resource Management Officer, State of Florida,  
Department of Management Services, Tallahassee, FL, May 2008 -  
June 2013**

Served as the organization's top human resources manager responsible for guiding and leading the human resources services, policies, and programs for the organization. Services included: Employee Relations, Classification & Pay; Organizational

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**Development and Realignment; Succession Planning, Recruitment and Staffing; Benefits Administration; Development and Training; Federal and State Compliance; Policy Development and Legislative Rule Interpretation, HRIS, Human Resources Strategic and Tactical Plans; Workforce Planning; Internal and External Customer Relations, and Budget.**

**Key Accomplishments:**

- **Successfully accomplished 25 organizational initiatives and deficiencies highlighted by independent consulting group 18 months ahead of established timeline.**
- **Developed strong and trusting working relationships with division leaders, organizational functional managers, agency employees, and external customers.**
- **Facilitated a work environment that fostered ethical decision-making and actions by motivating, promoting, and modeling ethical behavior.**
- **Lead HR professionals in the delivery of HR processes, procedures, and programs for all units.**
- **Provided progressive leadership and strong planning support to all divisions in order to identify and develop knowledge and talent gaps and enhance recruiting efforts within the organization.**
- **Collaborated with executive leadership, departmental directors, managers and supervisors to develop and achieve overall goals for the organization while providing support to establish and accomplish goals and objectives.**
- **Served as advisor and facilitator for workforce planning, policies, agreements, budget, and changes to legislation and federal laws that will impact the organization.**
- **Planned and oversaw HR department's responsibilities, to include tactical and strategic direction, both on a short-term and long-term basis.**
- **Served as lead contact for all divisions on human resource issues, inquiries and requests and provided input and direction for resolution of all employment matters, including Department of Labor, EEOC, Workers' Compensation and Unemployment claims.**
- **Oversaw employee relations inquiries, fact-findings and issue resolutions for all employee complaints, grievances, and employment issues and developed strategies for resolutions while ensuring consistency on all employment decisions and actions.**

- Represented employer in collaboration with labor attorney during union relations with: American Federation of State, County and Municipal Employees (AFSCME); and State Employee Attorney's Guild (SEAG) unions.
- Successfully defended employment actions before the Public Employee Relations Commission (PERC), Florida Commission on Human Relations (FCHR), EECO, union grievance processes, worker's compensation hearings; unemployment claims hearings, Federal Department of Labor, and private legal claims.

**Director, Human Resources, FSU Foundation, Inc., Tallahassee, FL, January 1996- April 2008**

Administered and maintained a comprehensive human resources program that included the the day-to-day administration and the development of personnel policies and procedures. Developed long and short term strategic direction to ensure challenges and opportunities of the origination were met. Managed department personnel and budget to assure goals and objectives were achieved. Collaborated with all levels of management and external customers to develop creative initiatives designed to enhance recruitment, development and retention of a quality work force. Resolved employee relations issues and ensured proper and complete documentation. Routinely mentored, and approved managers' disciplinary actions and involuntary terminations ensuring equity and compliance.

**Key Accomplishments:**

- Effectively managed a large influx of employees in a merger. Minimized the typical apprehension experienced by merged employees by providing one-on-one counseling.
- Initiated an orientation/sponsor program for new employees. The program united experienced employees with new employees, enhancing the sponsor's organizational knowledge while fostering camaraderie.
- Orchestrated an enhanced benefits plan which reduced the Foundation's FICA expenses by more than 3% per year and added options that allowed individual benefits packages to be customized to fit employee needs.
- Designed an Employee Wellness Program funded from surplus dollars saved during major medial health insurance negotiations.
- Implemented a robust web-based self-service benefits time/leave system which reduced workload for benefits and payroll staff, and allowed more employee involvement in personal benefits selections.

- Led an extensive training program and benefits fair to provide employees opportunities to make educated selections for benefits, investments and retirement plans.
- Examined staff compensation programs for external market competitiveness annually.

**Other Relevant Experience:**

**Senior Financial Aid Officer, South University, Savannah, GA**

Established an extensive training program for all financial aid officers to ensure effective competencies were maintained in The administration of financial aid awards.

**Human Resources Coordinator, Savannah Maritime Association, Savannah, GA**

Developed a computerized audit system to identify irregularities in ILA 1414 and Local 1475 Clerks & Checkers union employees' benefit awards and administration of unemployment insurance, workman's compensation, disability insurance claims, and the International Longshoremen Employees' Welfare Fund. Served as employer representative during union contract negotiations. Safety programs oversight.

**Volunteer Leader, Camp Humphreys, Republic of South Korea**

Orchestrated ninety-three military wives into a functioning body designed to address community interests. Successfully bridged communication and culture barriers and engaged all spouse and community representatives. Provided training for non-American wives in basic household accounting functions.

**Selected Areas of Qualifications Encompass**

Organizational Development & Change  
 Classification & Compensation  
 Employee Relations  
 Recruitment/Retention  
 Benefits Administration/Negotiations  
 Union/Civil Service & Labor Relations  
 Policy Creation/Implementation  
 Succession Planning  
 Training & Professional Development  
 Performance Management  
 Budget Administration  
 HRIS Management/Leadership





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# Mr. Lee Bouchelle

## Project Consultant

### Evergreen Solutions, LLC

#### **Education**

**Master's Degree, Resource Economics, University of Florida, 1989 - 1992**

- **1992 Dr. Frederick J. Prochaska Outstanding Masters Thesis Award for "An economic analysis of harvest restrictions in the North Atlantic swordfish fishery"**
- **Aylesworth Scholarship**

**Bachelor of Arts, Political Science/International Relations, University of Florida, 1986 - 1988 (Minor in Business)**

#### **Professional and Business History**

**Evergreen Solutions, LLC, Consultant, May 2016 - Present**

**Project Consultant of a Classification and Compensation Study for Jefferson County, Missouri**

**Project Consultant of a Compensation and Classification Study for Clay County, Missouri**

**Project Consultant of a Human Resources Department Assessment for the City of Buda, Texas**

**Project Consultant of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas**

**Project Consultant a Classification and Compensation Study for the City of Athens, Texas**

**Project Consultant of a Classification Study and a Compensation Survey for the City of Page, Arizona**

**Project Consultant of an Employee Classification and Compensation Study for Blount County, Tennessee**

**Project Consultant of a Compensation Update for the Central Ohio Transit Authority**

**Project Consultant of a Salary Comparability Study for the Springfield Housing Authority, Illinois**

**Project Consultant of a Classification and Compensation Plan Review for the City of Annapolls, Maryland**

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**Project Consultant of a Wages and Salary Scale Study for Washington County, Maryland**

**Project Consultant of a Position Classification and Compensation Study for Gaston County, North Carolina**

**Project Consultant of a Pay and Classification for the City of Williamsburg, Virginia**

**Project Consultant of a Classification and Compensation Study for the City of Fredericksburg, Virginia**

**Project Consultant of a Compensation Study for King George County, Virginia**

**Project Consultant of a Pay and Classification Study for the District 19 Community Services Board, Virginia**

**Project Consultant of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia**

**Project Consultant of a Classification and Compensation Study for Berkeley County, South Carolina**

**Project Consultant of a Classification and Compensation Study for Dorchester County, South Carolina**

**Project Consultant of a Pay and Classification Study for the Town of Moncks Corner, South Carolina**

**Project Consultant of a Salary Comparability Study for the Housing Authority of Florence, South Carolina**

**Project Consultant of a Classification and Compensation Study for the City of Delray Beach, Florida**

**Project Consultant of a Compensation and Classification Study for Alachua County, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Holly Hill, Florida**

**Project Consultant of a Compensation and Classification Study for the City of North Port, Florida**

**Project Consultant of a Classification and Compensation Study for the City of High Springs, Florida**

**Project Consultant of a Job Classification and Compensation Study for the City of Sunrise, Florida**

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Project Consultant of a Job Classification and Compensation Study for the City of Melbourne, Florida

Project Consultant of a Classification and Compensation Study for the City of Dania Beach, Florida

Project Consultant of a Pay and Classification Study for the Lake County Sheriff's Office, Florida

Project Consultant of a Classification and Compensation Study for the Pasco County Sheriff's Office, Florida

Project Consultant of a Compensation and Job Grading Analysis for the Jacksonville Aviation Authority, Florida

Project Consultant of FLSA Audits for the Southwest Florida Water Management District

Project Consultant of a Classification and Compensation Study for the City of Destin, Florida

Project Consultant of Compensation Consulting Services for the Town of Longboat Key, Florida

Project Consultant of a Compensation and Benefits Study for Forsyth County, Georgia

Project Consultant of a Classification and Compensation Study and Analysis for Douglas County, Georgia

Project Consultant of a Classification and Compensation Study for Lumpkin County, Georgia

Project Consultant of a Pay and Classification Study for the City of Chamblee, Georgia

Project Consultant of a Compensation Plan Update for the City of Garden City, Georgia

Project Consultant of an Employee Classification and Compensation Study for the City of Savannah, Georgia

**Consultant, ERS Group, Tallahassee, FL, April 2011 - 2015**

Participated in the development of large and complex economic and statistical research projects which analyze the effects of various business practices or economic programs.

**Research Associate II, ERS Group, Tallahassee, FL, December 2005 - April 2011**

Collected, compiled, analyzed and interpreted data from different sources, assists in analyzing and summarizing employment data,

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maintains and updates data project files, and assisted in the preparation of research reports.

**Senior Research Consultant, Ben Johnson Associates, Inc. Tallahassee, FL, 1995 – December 2005**

Assisted with the preparation and review of expert testimony, economic cost studies, rate cases, and financial analyses in various regulated utility proceedings throughout the country. Primary Excel developer of the Telecom Economic Cost Model that was submitted to the FCC and in numerous state local exchange cost dockets. Conducted Separations studies for small rural telephone companies in Arizona and Idaho and Productivity studies of the Telecommunications industry.

Prepared discovery requests and responses and provided cross-examination assistance to clients. Designed and managed a MYSQL database and prepared SQL queries for data-driven websites.

**Economic Consultant, Resource Economics Consultants, Inc., Gainesville, FL, 1993 - 1995**

- Analyzed a variety of different economic issues, including contingent valuations and econometric analysis for the Indian River Lagoon National Estuary Program (funded by the SJRWMD) in which I used an innovative modeling approach to assess fisheries impacts of water quality deterioration; and analyzed economic impacts associated with water quality programs in the Lake Okeechobee watershed for the South Florida Water Management District (SFWMD). Also analyzed the economic impacts of SWFWMD water supply restrictions on municipal public utilities.

**Software Skills**

SAS (Certified Base Programmer) , Excel (Expert user), Access, MYSQL, MS Office

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**Ms. Tameka Richardson**  
**Project Consultant**  
**Evergreen Solutions, LLC**

**Education**

**Master of Business Administration (MBA), Accounting , University of Phoenix, Phoenix, Arizona, November 2007**

**Bachelor of Science (BS), Accounting, University of Phoenix, Phoenix, Arizona, November 2005**

**Associate in Arts (AA), Accounting, Tallahassee Community College, Tallahassee, Florida, May 1993**

**Professional  
and Business  
History**

**Evergreen Solutions, LLC, Senior Analyst, September 2013 – Present**

**Project Consultant of a Compensation and Classification Study for the Liberty County School District No. 53, Missouri**

**Project Consultant of a Compensation and Classification Study for Clay County, Missouri**

**Project Consultant of a Classification and Compensation Study for San Miguel County, Colorado**

**Project Consultant of a Classification and Compensation Study for Sedgwick County, Kansas**

**Project Consultant of a Salary and Benefit Study for the City of Bloomington, Indiana**

**Project Consultant of a Classification and Compensation Plan Review for the City of Annapolis, Maryland**

**Project Consultant of a Job Classification and Compensation Study for Howard Community College, Maryland**

**Project Consultant of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia**

**Project Consultant of a Classification and Compensation Study for Greensville County and Greensville County Water and Sewer Authority, Virginia**

**Project Consultant a Classification and Compensation Study or Surry County and Surry County Social Services, Virginia**

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**Project Consultant of a Compensation and Classification Study for Prince George County, Virginia**

**Project Consultant of a Salary Market Study and Personnel Systems Study for Virginia's Region 2000 Local Government Council**

**Project Consultant of a Classification and Compensation Plan Update for Suffolk Public Schools, Virginia**

**Project Consultant of a Compensation and Classification Study for Prince George County Public Schools, Virginia**

**Project Consultant of a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, North Carolina**

**Project Consultant of Classification and Compensation Study and Benefit Survey for Cape Fear Public Utility Authority, North Carolina**

**Project Consultant of a Classification and Compensation Study for the Town of Hilton Head Island, South Carolina**

**Project Consultant a Classification and Compensation Study for the Town of Summerville, South Carolina**

**Project Consultant of a Classification and Compensation Study and Analysis for the Town of Cheraw, South Carolina**

**Project Consultant of a Pay and Classification Study for Dorchester County, South Carolina**

**Project Consultant of a Classification and Compensation Study for the City of Goose Creek, South Carolina**

**Project Consultant of a Compensation and Classification Study for Tuscaloosa City Schools, Alabama**

**Project Consultant of a Job Classification and Compensation Study for the City of Sunrise, Florida**

**Project Consultant of Job Audits for the City of Gainesville, Florida**

**Project Consultant of Classification and Compensation Services for the City of Dunedin, Florida**

**Project Consultant of Compensation Consultant Services for the City of Coral Springs, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Dania Beach, Florida**

**Project Consultant of a Compensation Study for the City of Hollywood, Florida**

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**Project Consultant of a Compensation and Classification Study for the City of Cocoa, Florida**

**Project Consultant of a Pay and Classification Study for the City of Holly Hill, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Lake City, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Palm Beach Gardens, Florida**

**Project Consultant of a Job Classification and Compensation Study for the City of Melbourne, Florida**

**Project Consultant of a Comprehensive Pay Plan Study for the City of Plant City, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Destin, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Ft. Myers, Florida**

**Project Consultant of Human Resource Consulting Services to the City of Orlando, Florida**

**Project Consultant of a Classification and Compensation Study for the City of Zephyrhills, Florida**

**Project Consultant of a Salary Survey for the City of Holmes Beach, Florida**

**Project Consultant of a Compensation Study for Lake County, Florida**

**Project Consultant of a Classification and Compensation Study for Pinellas County, Florida**

**Project Consultant of a Pay and Classification Study for Martin County, Florida**

**Project Consultant of a Pay and Classification Study for Gulf County, Florida**

**Project Consultant of Compensation and Classification Study Services for Monroe County, Florida**

**Project Consultant of a Compensation Analysis for Manatee County, Florida**

**Project Consultant of a Compensation and Classification Study for Alachua County, Florida**

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**Project Consultant of a Compensation Survey for CareerSource  
Pinellas, Florida**

**Project Consultant of Compensation and Classification Systems  
Consulting Services for the Collier County Sheriff's Office, Florida**

**Project Consultant of a Salary and Benefits Study for the Seacoast  
Utility Authority, Florida**

**Project Consultant of FLSA Audits for the Southwest Florida Water  
Management District, Florida**

**Project Consultant of a Job Classification and Compensation Study for  
Escambia County, Florida**

**Project Consultant of a Districtwide Job Classification and  
Compensation Study for the Escambia County School District, Florida**

**Project Consultant of a Compensation Survey for the Texas City  
Management Association**

**Project Consultant of a Compensation Study for South Texas College**

**Project Consultant of a Comprehensive Classification and Compensation  
Analysis for the Barton Springs/Edwards Aquifer Conservation District,  
Texas**

**Project Consultant of a Comprehensive Compensation and  
Classification Study for the City of Farmers Branch, Texas**

**Project Consultant of a Human Resources Department Assessment for  
the City of Buda, Texas**

**Project Consultant a Classification and Compensation Study for the  
City of Athens, Texas**

**Project Consultant of a Non-Faculty Compensation Review for Austin  
Community College, Texas**

**Project Consultant of a Compensation and Classification Study for  
Midwestern State University, Texas**

**Project Consultant of the Development of a Classification and  
Compensation Pay Plan for the City of Amarillo, Texas**

**Florida Department of Revenue- GTA (Accounts Management),  
Revenue Specialist II, 2013 - 15**

- processed sales tax exemption applications for non-profit organizations;
- registered and created business accounts of Florida's tax payers for required liability and obligations;



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- managed a diverse workload assigned by SAP to resolve account maintenance issues, correct tax returns and payments processed incorrectly;
  - conducted research, edited, and analyzed tax information on existing business partner/taxpayer accounts using multiple databases;
  - assisted in training and in the mentoring of new employees; and
  - attended, testified, and/or provided documentation for administrative hearings regarding tax protests.

**Florida Department of Revenue- GTA (Accounts Creation), Revenue Specialist I, 2013**

- examined and interpreted documentation to determine employer tax liability and tax obligation in accordance to federal/state requirements; and
- managed a diverse workload assigned by SAP to resolve account maintenance issues, correct tax returns and payments processed incorrectly.

**Florida Department of Revenue- GTA (Data Capture), Revenue Specialist I, March 2012 - 13**

- processed state tax documents of Florida's tax payers for required taxes;
- reviewed and edited tax documentation for data entry accuracy and determined compliance with Florida tax laws and established policies and procedures;
- communicated effectively with staff and management regarding processing and data system related issues;
- processed State of Florida vendor refund applications; and
- provided mentoring and training to staff.

**My Education Is Important (MEII), Academic Advisor Volunteer, 2009-present**

- coordinated and instructed afterschool and summer study sessions for youth and adults;
- consulted parents and students regarding academic scheduling and grades;

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- assisted parents and students in completing applications for financial aid and/or dual-enrollment;
  - developed lesson plans and study session schedules;
  - assisted college level students with coursework and assignments; and
  - assisted the Director of Education.

**LiveOps, Customer Care Independent Agent, 2006 - 12**

- performed as an inbound customer services agent;
- served as a virtual call center operator for various products and/or services; and
- utilized script-based platform to better serve customer needs.

**Florida Department of Law Enforcement, Accountant II (2010)**

- processed vendor payments utilizing various coding techniques to distribute and account for costs utilizing agency payment system;
- audited accounting and financial documents to ensure accuracy of information and calculations and made correcting entries using agency payment system; and
- prepared financial reports and supporting schedules for historical documentation.

**D. Wilson Consulting Group, LLC, Statistical Lead/Research Manager, 2006-10**

- supervised data entry and collection staff;
- created and managed databases for data entry and statistical analysis;
- developed data collection and auditing plans for state and federally funded agencies;
- researched procurement methods for contracting and subcontracting methods for federally-funded projects;
- compiled and performed data cleaning and scrubbing of purchasing, contract, subcontract and vendor data;
- designed and conducted survey analysis; and
- traveled and participated on data collection teams.

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**MGT of America, Inc., Research/Statistical Analyst, 2005-06; Senior Data Analyst, 2001-06; Data Assistant III, 1998-2001; Data Entry Control Clerk, 1994-98**

- conducted and served as Lead of purchasing, accounting and procurement data auditing for state- and federally-funded entities;
- determined compliance of Federal and State goals;
- participated on project kick-off meeting and data planning and assessment;
- designed and conducted survey analysis; and
- participated on data collection teams.

**Procurement,  
Accounting,  
Auditing &  
Statistical  
Analysis  
Experience**

The following is a partial list of projects outlining provided statistical auditing and research analyses experience of contract dollars awarded and spent with firms comparing NAICS and SIC industry codes and contracting dollars receive by agency. Agency purchasing and accounting data in the areas of transportation, policy research and development, management reviews, organizational development were audited to conduct studies.

- Data Collection Manager and Statistical Analyst of a project to assist the Jacksonville Transportation Authority (JTA) Disadvantaged Business Enterprise (DBE) and Minority Business Enterprise (MBE) programs create an operational plan to reengineer the programs' purchasing, accounting data and tracking system. Assisted with DBE and M/WBE certification process.
- Data Collection Manager and Statistical Analyst of a project to conduct an availability and disparity Study for the Alaska Department of Transportation and Public Facilities (AKDOT&PF) along with the Alaska Railroad Corporation (ARRC) and the Municipality of Anchorage. The study included analysis of purchasing, accounting data and contracting practices for all three agencies of disadvantaged, minority, and women business utilization. The AKDOT&PF also included separate analyses for Federal Highway Administration and the Federal Transit Administration.
- Data Collection Manager and Statistical Analyst of a project to conduct statistical analyses for State of Montana Department of Transportation (MDT). The analysis focused on the State of Montana's and Federal Aviation authority federally assisted accounting data and purchases. DBE program to include the Federal Highway Administration, Federal Transit Administration funding for disadvantaged, minority, and women businesses.

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- **Statistical Analyst of a project to conduct a comprehensive Disparity Study of their Minority and Woman-Owned Business Enterprise Programs for the City of Tucson and Pima County. The analysis focused on the accounting data and purchasing practices and utilization of disadvantaged, minority, and women businesses for both agencies.**
  - **Data Collection Manager and Statistical Analyst of a project to conduct a disparity and statistical study for the Colorado Department of Transportation within the legal framework established by 49 CFR Part 26 and court rulings. The study included a detailed review of procurement policies and procedures; accounting data and contract utilization analysis of highway construction and highway design for disadvantaged, minority, and women businesses.**





UNIVERSITY CITY, MISSOURI  
COMPENSATION AND CLASSIFICATION STUDY  
PROPOSAL

March 9, 2018



Principal Contact Person: Joellen Earl  
[jearl@govhrusa.com](mailto:jearl@govhrusa.com)  
847.380.3238

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**CITY OF UNIVERSITY CITY, MISSOURI**  
**Proposal for a Compensation and Classification Study**  
**March 9, 2018**

GovHR USA, LLC ("GovHR") is pleased to provide the City of University City with this Proposal for a comprehensive Classification and Compensation Study for the 260 employees in approximately 90 positions in the organization. The Study will include an evaluation of the City's overall employee compensation, benefits and pay structure to assure both internal and external (marketplace) equity; a job audit for each full-time position to determine appropriate classification; and updates to job descriptions as needed. The Study conducted by GovHR will insure that an equitable compensation system is in place that is both fair and competitive, enabling the City to recruit and retain qualified employees. The system will also be fairly easy to administer in an organized and consistent fashion, as well as sustainable for years to come.

**EXPERIENCE AND QUALIFICATIONS**

GovHR is a public management consulting firm serving municipal clients and other public-sector entities on a national basis. Our headquarters offices are in Northbrook, Illinois. We are a certified Female Business Enterprise in the State of Illinois, and work exclusively in the public sector. GovHR provides service to jurisdictions and agencies in a variety of contemporary issues, including management, financial, and human resources assistance.

GovHR is led by Heidi Voorhees, President, and Joellen Earl, Chief Executive Officer. Ms. Voorhees previously spent 8 years with the nationally recognized public-sector consulting firm, The PAR Group, and was President of The PAR Group from 2006 – 2009. Ms. Voorhees has 19 years of local government leadership and management service, with ten years as the Village Manager for the Village of Wilmette. Ms. Earl is a seasoned manager, with expertise in public-sector human resources management. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Earl has worked in forms of government ranging from Open Town Meeting to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.

Ms. Earl will serve as the Project Manager for University City's Compensation and Classification Study. Ms. Earl's contact information is:

**Joellen Earl**  
**Chief Executive Officer**  
**GovHR USA, LLC**  
**630 Dundee Road, Suite 130**  
**Northbrook, IL 60062**

630 Dundee Road, Suite 130, Northbrook, IL 60062  
Local: 847.380.3240 Toll Free: 855.68GovHR (855.684.6847) Fax: 866.401.3100 GovHRUSA.com

EXECUTIVE RECRUITMENT INTERIM STAFFING MANAGEMENT AND HUMAN RESOURCE CONSULTING

[iearl@govhrusa.com](mailto:iearl@govhrusa.com)  
Telephone 847-380-3238  
Facsimile 866-803-1500

Ms. Earl will be assisted by Ms. Alice Bieszczat, Ms. Sarah McKee, Mr. Patrick Carey and Ms. Judy Schmittgens in data gathering and employee interviews. Ms. Schmittgens will draft updates to the job descriptions, as needed.

GovHR has conducted over 50 classification and compensation studies within the past 5 years. Without fail, every pay plan recommended by GovHR has been successfully implemented by the client. A list of the Firm's studies for the past five years is attached to this Proposal. Additional Studies and a complete list of GovHR's clients are included on our website at [www.govhrusa.com](http://www.govhrusa.com).

### REFERENCES

#### **City of Joliet, Illinois**

Classification and Compensation Study (2017)  
Contact: Marty Shanahan, Corporation Counsel  
150 W. Jefferson Street  
Joliet, Illinois 60432  
[mshanahan@jolietcity.org](mailto:mshanahan@jolietcity.org)  
Telephone: (815) 724-3805  
Project Manager: Joellen Earl  
70 Employees, 64 Positions

#### **Village of Arlington Heights, Illinois**

Classification and Compensation Study (2016)  
Contact: Mary Rath, Human Resources Director  
33 S. Arlington Heights Road  
Arlington Heights, Illinois 60005  
[Mrath@vah.com](mailto:Mrath@vah.com)  
Telephone: (847) 368-5000  
Project Manager: Joellen Earl  
420 Employees/125 Positions

#### **Village of Mount Prospect, Illinois**

Classification and Compensation Study (2016)  
Contact: Joan Bokina, Human Resources Director  
50 S. Emerson Street  
Mount Prospect, Illinois 60056  
[JBokina@mountprospect.org](mailto:JBokina@mountprospect.org)  
Telephone: (847) 392-6000  
Project Manager: Joellen Earl  
131 Employees/79 Positions

#### **City of New Berlin, Wisconsin**

Classification and Compensation Study (2016)  
Contact: Kari Morgan, City Clerk/Director of Administrative Services  
New Berlin City Hall, 3805 S. Casper Dr.

New Berlin, WI 53151-0921  
[kmorgan@newberlin.org](mailto:kmorgan@newberlin.org)  
Telephone: (262) 797-2447  
Co-Project Managers: Joellen Earl and Alice Bieszczat  
170 Employees, 88 Positions

**Village of Plainfield, Illinois**  
Classification and Compensation Study (2016)  
Contact: Traci Pleckham/Director of Management Services  
24401 W. Lockport Street  
Plainfield, IL 60544  
[tpleckham@goplainfield.com](mailto:tpleckham@goplainfield.com)  
Telephone: (815) 439-2924  
Project Manager: Joellen Earl  
145 Employees, 65 Positions

### **PROJECT APPROACH AND METHODOLOGY**

University City would like a comprehensive review and update of its current classification and compensation system, including a review of benefits, for its approximate 260 employees in 90 full-time positions, including 79 commissioned police officers. One of the purposes of the Study is an evaluation of the labor market, and the Study data will allow the City to better understand its competitive pay position and to determine its strengths and weakness relative to the comparable labor market. The City also desires updated job descriptions to reflect current job duties and appropriate FLSA classification.

To accomplish these objectives, GovHR will perform the following steps (listed in the order that the work will be performed). Please note, we have specified several areas where we will need the City's input/assistance.

#### **Meetings, Salary and Benefits Survey, Job Analysis.**

**DELIVERABLE:** Start Up Documents

**DELIVERABLE:** Job Analysis Questionnaire Form

- **Study preparation and project meeting (1<sup>st</sup> trip/Project Manager).** Meet with City representatives to discuss study methods, review organization charts, personnel rules and regulations, and the current classification and pay plans. We will seek to determine problem areas, answer questions, and review the scope and schedule of work, and the data and assistance GovHR will need from the City to accomplish this task. Prior to the meeting, GovHR will require copies of the organization charts for each department, all pay plans, the current personnel manual and any other relevant information related to salaries to make for a more productive initial meeting.
- **Establishing comparables – public and private sector**  
**DELIVERABLE:** Group of Comparable Communities and Private Sector Companies

#### **Public Sector**

Working with City staff and using our broad-based cohort methodology, we will determine a logical survey sample of "like" municipalities that impact the compensation market for the City. In

selecting public employers, we normally use criteria such as number of employees, population served, EAV, budget size, proximity, etc., the purpose of which is to select jurisdictions that are most comparable to University City.

#### **Private Sector**

The Consultant understands that the City may also like to survey private employers for salary comparison purposes. While GovHR is happy to accommodate the Client, it is our experience that there are three potential problems with this request. First, there are few “like” positions in both the public and private sectors. Second, we have found that obtaining salary data from private employers is extremely difficult to secure. Unlike public employers, a private employer’s salary information is not part of the public record and they are under no obligation to share this with others. We have found that even after many attempts to get the data, we may be unsuccessful. And finally, private sector salary data may not be accurate if the respondent does not include bonuses, commissions or stock options as part of the base salary. Because of this, GovHR cannot guarantee successful results in obtaining the data. (It should also be noted that in GovHR’s experience, private sector data may only be available as aggregate data and not employer or job description specific. Additionally, the data may not be current.) Our methodology for surveying private sector employers would be, with the assistance of City representatives, to select four (4) to six (6) major employers in the University City area that would have some “like” positions (up to 15) for comparability purposes (e.g., clerical, human resources, accountants). We would then design and send out a separate survey for this group and make one follow up contact to secure salary data. In addition, we would check another survey source (e.g., the Bureau of Labor Statistics) to gather regional salary data on select classifications, if desired by the City.

- **Employee Kickoff Meeting (2<sup>nd</sup> trip/Project Manager)**

Shortly after the initial project meeting with the University City representatives, the Consultant will meet with employees to explain the scope of the project and distribute Job Analysis Questionnaire (JAQ) forms. GovHR understands that many employees have not participated in this type of process before, and we take the time to carefully explain the purpose of the project to the employees and to answer any questions they may have. If any of the employees are not available when these first meetings are held, they can view a video presentation of the meeting. Employees will then be allowed two (2) weeks to complete the questionnaire. The questionnaires will also be reviewed by each employee’s supervisor and returned to GovHR within two (2) weeks of distribution.

- **Prepare and send out salary and benefits surveys.**

GovHR will design and send out the salary surveys (under City letterhead) to gather salary data for benchmark classifications in the comparable communities. To accomplish this, the Project Manager will work with City representatives to select approximately 35 – 40 benchmark classifications from the City’s 100 classifications covered in the Study. These classifications will be chosen on the criteria of those that are most common in all communities and that cover all the various pay grades in University City. In addition to job titles, brief position descriptions are included in the salary survey to make sure we are receiving salary data for “like” positions in the comparable communities.

**Note:** While GovHR will prepare all the materials to be sent out for the salary and benefit surveys, we have found that sending out the survey under the client’s letterhead generates a better/faster response from the survey respondents than when it is sent out under our letterhead/name. In

addition, the City *may* be asked to make one follow up contact to those municipalities that do not initially respond to the survey request.

• **Job evaluation analysis and establishment of job classification system (3<sup>rd</sup> trip/Consultant Team).**

Upon return of the JAQs by the City, GovHR will perform the following:

- Read each JAQ (up to 260) and corresponding Job Description (up to 90), in their entirety.
- Personally interview at least one (1) employee from each job classification to further understand the scope of their job.
- Apply a measurement system of job evaluation factors, using nine (9) main factors used in our job evaluation instrument in order to evaluate the internal/comparable worth of each job classification. Upon completion of the job evaluation measurements, a new Classification Plan will be developed. It is important to emphasize that the job, not the qualifications or performance of the incumbents, is being evaluated. Part of this process will include the evaluation of current job titles and the recommendation for any changes to same, assuring that the job title and related recommended pay range matches what the employee is actually doing.

**Note:** A formal job evaluation system, such as the one utilized by GovHR, is an attempt to objectify the reasons that jobs are compensated differently. Most compensation practitioners agree that three (3) basic factors are important in determining compensation. These are: (1) skills required; (2) responsibility; and (3) working conditions. The Equal Employment Opportunity Commission recognizes these three (3) basic factors, along with seniority and performance, as valid determinants of compensation. The nine (9) factors used by GovHR are essentially subdivisions of the first three (3) factors mentioned above. In addition, it is GovHR's practice that, under Title VII of the Civil Rights Act of 1964, the Americans with Disabilities Act (ADA), and the Age Discrimination of Employment Act (ADEA), it is illegal to discriminate in any aspect of employment. GovHR will not use discriminatory practices on the basis of race, color, religion, sex, national origin, disability, or age when performing a classification analysis. Decisions and recommendations will not be based on stereotypes or assumptions about the abilities, traits, or performance of individuals of a certain sex, race, age, religion, or ethnic group, or individuals with disabilities.

- Based on the results of the job evaluation process outlined above, assign all classifications to skill levels.

**Note:** Logical breaks in the continuum of points determine the skill levels used for determining the classification system. For example, skill level 1 might contain jobs that scored between 185 and 200 points, skill level 2 between 205 and 220 points, and so on.

- Review the results of the job evaluation exercise with City representatives, and revise as necessary.
- Review each position's current FLSA classification and make recommendations as appropriate.

## **II. Salary and Benefit Survey Analysis.**

**DELIVERABLE:** Salary Survey Data

**DELIVERABLE:** Benefit Survey Data

**DELIVERABLE:** New Salary Schedules

The following steps will be included in this component of the Study:

- Tabulate, summarize, and analyze comparative compensation information obtained through the surveys. Our pay tabulations compare the City's salaries for the surveyed positions, with the average minimum and the average maximum of the survey data for each surveyed class, when possible. Data is displayed for each jurisdiction on each class and summarized in an overall table. This data is analyzed to determine the percentage difference between the City's present pay for each class and the survey data.
- The Consultants will work with the City at the initial meeting to determine the City's policy with respect to compensation (i.e., 50<sup>th</sup> percentile; 75<sup>th</sup> percentile, etc.). Once this is determined, the Consultants will use the salary survey data to develop and recommend new salary schedules for the City's 90 classifications. This process will include a recommendation regarding how employees are inserted into the new plan and how they move through the proposed pay plan (either via a merit system or defined merit increment plan), with recommendations for a specific performance-oriented program with respect to salary advancement through the new salary ranges. The salary schedules will outline what the specific percentages are between ranges and grades.  
**Note:** GovHR always recommends that there be a merit component associated with the granting of wage adjustments and a recommendation for this will be included in the City's report.
- Tabulate, summarize, and analyze comparative benefit information obtained through the survey, including pension and leave benefits. Make suggestions and recommendations where City benefits are inconsistent with the survey group. (Note: Regarding health benefits, GovHR typically requests respondents to provide information regarding employee and employer contribution amounts and for a copy of their health summary, which is provided to the Client. If a more detailed analysis is desired, GovHR can provide this for an additional cost at our hourly rate.)

### III. Progress Reports (4<sup>th</sup> Trip/Project Manager)

GovHR prides itself on our attention to and communication with our clients as the project proceeds. As such, GovHR will strive to maintain regular contact with the City's representative and to be available to address the Client's questions, concerns and needs.

GovHR will make regular progress reports to the City as requested, particularly at critical points in the Study. Additionally, the Project Manager will meet with the City representative, elected officials and other key City staff such as Department Heads to participate in a question and answer session and to review the results of the job evaluation exercise and the proposed new salary schedules.

### IV. Draft and Final Report Preparation

**DELIVERABLE:** Draft and Final Report

A draft report will be prepared by the Consultants and sent electronically to the City that includes:

- an Executive Summary highlighting the overall scope of the Study and the general observations, outcomes and recommendations contained within the Report;
- a summary of all aspects of the Study, including recommendations, methods and guidelines for achieving the overall aspects of the Study as well as recommendations for annual maintenance and review of the new plans;
- pay range options that are consistent with the City's pay policy, outlining the pros and cons of each option;

- assignment of each position to an appropriate classification and pay grade based on internal equity and marketplace considerations;
- recommendations on keeping the plan current, equitable and up to date over the next ten years.
- An implementation plan and cost estimates of implementing the Study's findings and recommendations.

**Note:** Overtime costs will not be included, and the analysis will be estimates only, with sufficient detail to allow the City to compare various options.

- Once the City representatives return review comments, a final report (one hard copy and one electronic copy for reproduction) will be prepared and sent to the City.

#### **V. Presentation of Findings (5<sup>th</sup> Trip/Project Manager)**

The Project Manager will make a presentation of findings to City management detailing the final results of the Study. The final report will include a procedure manual and appropriate forms for Human Resources staff and/or supervisors to maintain the recommended classification and pay plan(s).

#### **VI. Job Description Update**

GovHR will update the City's job descriptions as needed to reflect current job duties, education and experience requirements, requisite knowledge, abilities and skills, physical conditions and exempt/nonexempt status under the FLSA guidelines. Fees for this service are in addition to the quoted price of the Study; see Cost of Services section below.

#### **PROPOSED PROJECT TIMELINE**

GovHR is available to start this project within two weeks of acceptance of its proposal. A Study of this size would normally take approximately 120 days. This timetable is, however, contingent upon the timely response from the comparable municipalities supplying the salary data, as well as the timely response of the University City employees in returning the JAQs.

Following is a detailed breakdown of the work schedule:

- Week 1: Meet with City representatives to discuss Study methodology and expectations.
- Week 2: Prepare and distribute salary and benefits surveys to comparable communities.
- Week 3: Meet with employees to hand out JAQs and explain the purpose of the Study and the process.
- Week 4 to 6: Return of JAQs and salary surveys.
- Week 7: Reading of JAQs and job descriptions; return with Consultant Team to interview employees.
- Week 8 and 9: Analyze data; prepare new classification and compensation plans.
- Week 10: Send draft findings to University City.
- Week 11: Meet with key City representatives to review preliminary findings.
- Week 12: Prepare Draft Report and send to University City.
- Week 13: Get return comments from University City.
- Week 14: Prepare Final Report.
- Week 15: Present Report to City Council.
- Updating of job descriptions – done as requested.

GovHR is mindful of the Client's desire to have a finished quality product within a reasonable time after initiating a Study of this kind, and we pride ourselves in adhering to this timeframe. Our past clients will confirm our diligence in delivering our report and other deliverables on time.

### COST PROPOSAL

The cost of the services described in GovHR's Proposal is based on the time of our professional and support staff to complete it, as well as travel/transportation costs and miscellaneous expenses such as report reproduction, postage and supply expenses. We estimate the maximum cost of the project based on the above factors and propose a not-to-exceed fee inclusive of expenses. It is expected that the City will provide office and/or conference room space, access to a telephone, and photocopying/printing support while our staff is in residence.

In keeping with the above statement of our usual practices, we estimate the fee for the entire study to be **\$36,000** (\$32,500 for professional fees and \$3,500 for expenses) and will agree to complete the study for this **fixed fee of \$36,000** plus Job Description Updates and other Optional Services – see below. We have listed the cost of our professional fee for each study component below.

Payment will be due as follows: 40% of the professional fees (\$13,000) will be due at the time the contract is signed; 40% (\$13,000) approximately 10 weeks after the project begins, upon the delivery of the preliminary findings, and the remaining 20% (\$6,500) plus expenses will be billed after the Study is completed. Invoices will be sent to the City and are payable within 30 days of receipt, after which a 2% monthly interest charge will accrue. If the City requests Job Description updates, a separate invoice will be sent after they are completed.

<u>Study Phase Breakdown</u>	<u>Hour Breakdown</u>	<u>Cost</u>
<b>I. Meetings, Salary and Benefit Survey, Job Analysis</b>		
Study preparation and project meeting (1 <sup>st</sup> trip/Project Manager)	12 hours	<b>\$1,500</b>
Establishing comparables		
• Public Sector	8 hours	<b>\$1,000</b>
• Private Sector	2 hours	<b>\$250</b>
Employee kickoff meetings (2 <sup>nd</sup> trip/Project Manager)	12 hours	<b>\$1,500</b>
Prepare and send out salary and benefit surveys		
• Public Sector	8 hours	<b>\$1,000</b>
• Private Sector	4 hours	<b>\$500</b>
Job evaluation analysis and establishment of job classification system		
➤ reading of up to 260 JAQs/90 JDs	10 hours	<b>\$1,250</b>
➤ employee interviews (3 <sup>rd</sup> trip/Consultant Team)	76 hours	<b>\$9,500</b>
➤ analyzing data and establishing classes	16 hours	<b>\$2,000</b>
➤ assigning of skill levels	10 hours	<b>\$1,250</b>
➤ review and evaluation of preliminary analysis with City representatives	8 hours	<b>\$1,000</b>
➤ FLSA review and recommendations	8 hours	<b>\$1,000</b>



<b>II. Salary and Benefits Survey Analysis</b>		
Analyzing salary and benefits survey data		
<ul style="list-style-type: none"> <li>• Private Sector</li> <li>• Public Sector</li> </ul>	16 hours 8 hours	\$2,000 \$1,000
Establishing new salary schedules	16 hours	\$2,000
<b>III. Meet with City (including elected officials and Department Heads) to Review Data and Job Classifications (4<sup>th</sup> trip/Project Manager)</b>		
	16 hours	\$2,000
<b>IV. Draft and Final Report Preparation</b>		
Writing draft report	16 hours	\$2,000
Final report	4 hours	\$500
<b>V. Presentation of Findings (5th trip)</b>		
	10 hours	\$1,250
<b>PROJECT HOUR AND COST TOTAL</b>	<b>260 Hours</b>	<b>\$32,500 plus expenses</b>
<b>Updates to Job Descriptions – see below.</b>		

**NOTE:** If University City accepts our proposal for this project, GovHR will for one (1) year from the date of the signature of this agreement, provide support services at no additional cost. This will include any telephone communication necessary by the staff with regard to any questions concerning the report.

**OPTIONAL SERVICES/EXPENSES:**

**Progress Reports** – It is customary to have periodic telephone conversations throughout the Study to give progress reports. There will be no charge for these periodic telephone updates.

**Additional Site Visits** – If the City chooses to have the Consultants make an additional on-site visit to present the findings of the Study to the City employees, or any other additional on-site visits, there would be an additional cost of \$1,200 for professional fees and expenses per visit.

**Job Descriptions** – Updates to existing job descriptions cost \$150.00 each; new job descriptions, if needed, cost \$250.00 each. The job descriptions are done after the rest of the Study is complete and are billed separately.

In the interest of saving the Client money, GovHR will make recommendations and provide a template to the City where only minor changes are needed and could be accomplished in-house, if desired.

**Additional Services** – any additional services not covered in this Proposal and requested by the City will be billed at the rate of \$125 an hour plus expenses.

This quote is good for a period of three months, after which prices may increase.

**CONCLUDING REMARKS**

In closing, GovHR is a public-sector management consulting firm devoted to assisting only public-sector entities. We believe that the team assembled for conducting the proposed study for University City is of the highest caliber and qualifications. We are not aware of any conflicts of interest that would prevent us from working with the City on this Study.

GovHR appreciates your consideration of this Proposal and looks forward to the opportunity to work with the University City on this important project.

Sincerely,



Joellen Earl  
Chief Executive Officer  
GovHR USA, LLC

## APPENDIX A – CONSULTANT BIOGRAPHIES

### **Joellen C. Earl**

**Co-Owner, GovHR USA, LLC**

**President/Co-owner – GovTempsUSA**

Joellen Earl is the Co-Owner of GovHR USA, LLC, a company that combines Voorhees Associates, LLC and GovTempsUSA, LLC. GovHR USA focuses on recruitment, interim staffing, management and human resources consulting and professional development. Prior to creating GovHR USA, Ms. Earl founded GovTempsUSA along with Ms. Heidi Voorhees. She has managed the day-to-day operations of the interim staffing firm since its inception in 2011 and has overseen numerous human resources studies, recruitments and related projects.

Ms. Earl is currently serving as the Project Manager on Classification and Compensation Studies in Moline, McHenry and the Greater Peoria Transit District in Illinois, and on a Classification and Compensation Study including job descriptions updates for part-time positions in Southborough, Massachusetts. She recently completed Studies in Lexington, Eastham and Weston, Massachusetts; The Bloomfield Township Library District in Bloomfield, Michigan; and for Arlington Heights, Mount Prospect, Joliet, Rantoul and Round Lake, Illinois.

Ms. Earl is regarded for the commitment and dedication she has shown in her service to local government over her twenty-four year career. She is a seasoned manager, with expertise in public sector human resources management. She has worked in three states: Massachusetts, North Carolina and Illinois; and in six jurisdictions, with populations ranging from 15,000 to 150,000: Holden, Northborough, Yarmouth and Barnstable, Massachusetts; Catawba County, North Carolina; and Evanston, Illinois. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Earl has worked in forms of government ranging from Open Town Meeting to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.

One of Ms. Earl's significant abilities is to think and act strategically. She has the proven ability to start with a conceptual idea, identify stakeholders, develop a scope of work, supervise the agreed upon process, and deliver desired outcomes.

In addition, she is adept at assessing service delivery, identifying efficiencies and areas of opportunities and implementing recommendations. In Evanston, she took a newly formed department of Administrative Services and improved operations in all areas: Finance, Human Resources, Information Technology and Parking Operations, with a 30% reduction in staff.

Ms. Earl holds an undergraduate degree in Economics from Worcester State College in Worcester and a Master of Public Administration degree from Northeastern University in Boston, MA. She is a proponent of continuing education and continuous learning. She attended the Senior Executive Institute, Leading, Educating and Developing (LEAD) Program, at the University of Virginia's Weldon Cooper Center for Public Service in 2008.

Ms. Earl has valued her professional affiliations throughout her career and has been privileged to serve on numerous local, state and national committees. A highlight was serving on the International City/County Management Association (ICMA) Executive Board from 2001 to 2003.

**Alice Bieszczat**  
**Associate Vice-President/Human Resources Management Consultant**  
**GovHR USA**

Alice Bieszczat joined Voorhees Associates in early 2013 and brings almost 20 years of experience spanning the private, non-profit and public sectors to the organization. Ms. Bieszczat has a Master's Degree in Public Service Management and a Bachelor of Science Degree in Mathematics, both from DePaul University. In addition, she has provided human resources consulting services for both Voorhees Associates and The PAR Group, as well as non-profit consulting services for clients including the Ann & Robert H. Lurie Children's Hospital of Chicago, the North Shore Senior Center and the Archdiocese of Milwaukee.

Ms. Bieszczat's most recent consulting assignments for GovHR have included Classification and Compensation Studies in Illinois, Wisconsin, Iowa and Indiana. She has served as the Project Manager for Classification and Compensation Studies in Wisconsin (Algoma, Waukesha, Cross Plains, Evansville, New Berlin and Berlin), Illinois (Des Plaines, Sterling and Dixon), and Iowa (Burlington). She also assisted with numerous studies including those for Munster, Indiana; Joliet, New Lenox, Richton Park and Villa Park in Illinois; and the Baraboo District Ambulance Service in Wisconsin.

Ms. Bieszczat also worked for the Chaddick Institute of Metropolitan Development at DePaul University. During her tenure there she helped implement programs advancing the field of urban planning and design review for municipalities in metropolitan Chicago. Her research on transportation innovations was published in the Transportation Research Journal and featured in national media such as the *New York Times*, *Atlantic Cities* and *Planning Magazine*. She has lectured on transportation innovations in conference, seminar and university settings. At Lurie Children's Hospital of Chicago, Ms. Bieszczat led the Foundation Gifts team in securing leadership gifts to support its community-based outreach programs and the construction of its new facility in downtown Chicago. Ms. Bieszczat began her career in telephony. As a Radio Frequency Engineer for Sprint Cellular and Alltel, she partnered with local maintenance technician teams to plan, design, implement and optimize cellular phone networks nationwide.

**Sarah McKee**  
**Vice-President**  
**GovHR USA**

Sarah McKee has extensive experience as a local government manager and in non-profit management. Ms. McKee has been a manager in Johnstown, OH (5,500) and Rolling Meadows, IL (25,000). While managing in Johnstown, the community saw a 20 percent growth in residential and commercial development, and Ms. McKee was instrumental in establishing their first comprehensive plan as well as a downtown revitalization plan. Additionally, under her management, the Village undertook a \$5 million renovation of their Waste Water Treatment Plant and became a part of Licking County's Strategic Planning process as a supplier of sewage treatment for the NW section of the county.

During the recession of 2008, she led Rolling Meadows through a workforce reduction which also included an early incentive retirement program as well as a successful re-negotiation of police and fire contracts for additional cost savings to the city. Additionally, she developed a retention and expansion program for the community's commercial and industrial businesses and attracted additional employers to their corporate centers. As the City's representative to the Northwest Suburban Municipal Joint Action Water Agency, she participated in the strategic planning process of the agency. During her service on the Agency's Board of Directors, the agency began their

negotiations with O'Hare and the Illinois Tollway for a \$73M dollar relocation of their main supply line along the I-90 corridor.

Ms. McKee also has extensive experience in Public Works administration. Having served as a solid waste and fleet superintendent prior to being a public works director, she is known for several innovative ideas that have saved millions of dollars in local governments. While serving as the solid waste superintendent in Paducah, KY, she created the first biosolids waste composting facility in the state. She was also an instructor in the Kentucky Yard Waste Composting operator certification program and presented at various APWA and SWANA training sessions.

Through the International City Management Association's international program and their cooperation with USAID, Sarah was asked to assist the country of Bulgaria in developing their solid waste management program as they transitioned to the European Union. She spent over seven years developing their program and training their environmental experts as well as assisting in the development of their landfills and composting facilities. In addition to Bulgaria, Sarah also spent time in Beirut, Lebanon and Bangalore, India in the development of their economic development plan.

Recently, Ms. McKee expanded her experience into non-profit management. She served as the first Executive Director of the Issaquah Highlands Community Association. Issaquah Highlands is an award winning, large scale master planned and built green urban village located just east of Seattle, WA. As part of the development, the Association also maintained a private water system serving the highest elevations of the community and then successfully negotiated a transition of the plant to the City of Issaquah after a \$3M renovation.

**Patrick W. Carey**  
**Vice President – GovHR USA**

Patrick W. Carey brings over 37 years of public sector management and consulting experience to GovHR USA, and is now working on a range of projects for public sector and not-for-profit agencies. He has assisted with interviewing public safety personnel and analysis in Classification and Compensation Studies in Arlington Heights, Des Plaines, Joliet, Mount Prospect, Plainfield and Round Lake, Illinois.

Mr. Carey began a law enforcement career with the Glenview, IL Police Department in 1976, and rose through the ranks to become Deputy Chief of Police in 1987. In 1996 he was chosen to become the Chief of Police for Libertyville, IL, and served in that position until retiring in 2010.

Mr. Carey joined the Illinois Law Enforcement Alarm System (ILEAS) in 2010 as the Regional Emergency Planning Coordinator for the 110 law enforcement agencies in the Illinois counties of Lake, McHenry and northern Cook. He was promoted to Chief of Staff during his work with ILEAS.

During his career, Mr. Carey served on the executive committees and boards of several intergovernmental agencies and associations, including as President of the Northeastern Illinois Regional Crime Laboratory, Lake County Chiefs of Police Association, and as Treasurer for the Northern Illinois Police Alarm System (NIPAS), Secretary for Region 4 of ILEAS, and on the Board of Directors for both the Lake County Metropolitan Enforcement Group and Central Lake County Law Enforcement Communications Consortium. He also served on the Illinois Chiefs Association committee to form ILEAS, the statewide law enforcement mutual aid consortium beginning in 2002, which now includes more than 900 governmental agencies within Illinois as members, and is a continuing effort that remains unique within the United States.

Mr. Carey's experience includes extensive work on policy and procedure analysis, including original development of practices to meet new requirements, and for modernizing existing practices to improve risk management aspects, to meet budgetary constraints, and to improve operational efficiency. Those efforts included development of a sustainable police operational analysis to meet the requirements of national accreditation and re-accreditation, development of internal affairs processes, fine tuning recruitment and promotional systems, analysis of comparables for negotiation of labor agreements and compensation analysis studies. Mr. Carey also led the successful development of an employment system for ILEAS, where 75 independent contractors were converted to employees, including preparation of job descriptions, determination of FLSA status, employment conditions, pay and salary scales, payroll practices and employment rules and regulations. He has participated during the selection processes of a variety of governmental positions and promotions, with experience assessing thousands of resumes and job applications, and has served extensively as an interviewer. Mr. Carey has also worked at several locations across the United States as a consultant for a large medical supply company, providing training on early recognition and intervention for workplace violence situations, facility security risk reduction methods, and development of policies for employee access systems.

Mr. Carey has an undergraduate degree from Northwestern University, majoring in Organizational Behavior, and a Master of Science from National Louis University (formerly National College of Education), in Management & Development of Human Resources. He is also a graduate of the Northwestern University Police Administration Training Program.

**Judith M. Schmittgens**  
**Compliance and Client Relations Manager**  
**GovHR USA**

Judy Schmittgens joined the Company in 2013 as the Compliance and Client Relations Manager for GovHR. She handles the company's licensing and certification requirements, monitors legislation pertinent to the company's business operations, and maintains the corporate records. She also assists with drafting proposals for classification and compensation studies and other business procurement opportunities, and has assisted with employee meetings and interviews for studies in Arlington Heights, Elmhurst Park District, Glencoe, Plainfield, Romeoville, Richton Park, Villa Park, Dixon and Sterling, Illinois; Eastham and Weston, Massachusetts; Windsor, Connecticut; and in Cross Plains, Franklin and Waukesha, Wisconsin. Ms. Schmittgens is responsible for reviewing job descriptions for legal compliance, and has performed job description updates and FLSA status review for numerous municipalities.

Ms. Schmittgens is an Illinois licensed attorney and has been in private practice for the past eighteen years. Prior to that, she was the Senior Counsel and Manager of Government Affairs for Interstate National Corporation (a division of Fireman's Fund Insurance Company), where she was responsible for contract and policy review, company and agent licensing, and litigation management.

Ms. Schmittgens received her law degree from Indiana University and her Bachelor's Degree in Political Science from Illinois State University.

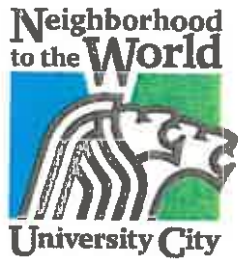
**APPENDIX B - GovHR PROJECT LIST**

<b>GovHR CURRENT AND COMPLETED PROJECT LIST</b>		
<b>Client</b>	<b>Study</b>	<b>Year Completed</b>
Baraboo, Wisconsin	Compensation	In progress
ILCMA	Strategic Plan	In progress
Greater Peoria Mass Transit Dist., Illinois	Classification and Compensation	In progress
Lincolnwood, Illinois	Police Department Analysis	In progress
McHenry, Illinois	Classification and Compensation	In progress
Moline, Illinois	Classification and Compensation	In progress
South Milwaukee, WI	Streets Department Study	In progress
Arlington Heights, Illinois	Classification and Compensation	2017
Bloomfield Township Library	Classification and Compensation, Job Descriptions	2017
Elmhurst Park District	Classification and Compensation	2017
Geneva, Illinois	Organizational Analysis	2017
Joliet, Illinois	Classification and Compensation	2017
Lexington, Massachusetts	Classification and Compensation	2017
Maryland Heights, Missouri	Organizational Assessment and Staffing Analysis	2017
Morton Grove, Illinois	Executive Coaching and Strategic Plan	2017
Mukwonago, Wisconsin	Classification and Compensation	2017
Mount Prospect, Illinois	Classification and Compensation	2017
Needham, Massachusetts	Compensation	2017
North Aurora, Illinois	Job Descriptions	2017
Oak Park Township	HR Needs Assessment	2017
Palatine Park District	Classification and Compensation	2017
Park District of Oak Park, Illinois	Compensation	2017
Rantoul, Illinois	Classification and Compensation	2017
Round Lake, Illinois	Classification and Compensation	2017
Southborough, Massachusetts	Classification and Compensation (PT jobs)	2017
St. John, Indiana	Police & Fire Staffing Analysis	2017
Weston, Massachusetts	Classification and Compensation	2017
Windsor, Connecticut	Classification and Compensation	2017
Algoma Sanitary District	Compensation	2016
Burlington, Iowa	Classification and Compensation	2016
Des Plaines, Illinois	Classification and Compensation	2016
Eastham, Massachusetts	Classification and Compensation	2016
Geneseo Park District, Illinois	Strategic Plan	2016
Glencoe, Illinois	Classification and Compensation	2016
Machesney Park, Illinois	Compensation, Job Descriptions	2016
New Berlin, Wisconsin	Classification and Compensation	2016

Niles, Illinois	Compensation	2016
Pekin, Illinois	Organizational Analysis	2016
Plainfield, Illinois	Classification and Compensation	2016
Rantoul, Illinois	Classification and Compensation	2016
Riverside/ North Riverside, Illinois	Dispatch Consolidation Project	2016
South Barrington, Illinois	Classification and Compensation	2016
South Barrington, Illinois	Police Staffing Analysis	2016
Winnetka Park District, Illinois	Strategic Plan	2016
Berlin, Wisconsin	Classification and Compensation	2015
Dixon, Illinois	Classification and Compensation	2015
Evansville, Wisconsin	Compensation	2015
Franklin Park, Illinois	Compensation	2015
Franklin, Wisconsin	Classification and Compensation	2015
Munster, Indiana	Classification and Compensation, Job Descriptions	2015
Oregon, Illinois	Compensation and Benefits	2015
Oshkosh, Wisconsin	Public Works Department Analysis	2015
Park District of Highland Park, Illinois	Classification and Compensation	2015
Plymouth, Wisconsin	Recreational Services Analysis	2015
Portage, Wisconsin	Organizational Analysis	2015
Romeoville, Illinois	Classification and Compensation, Staffing Analysis	2015
Schiller Park, Illinois	Police Department Analysis	2015
Southborough, Massachusetts	Classification and Compensation	2015
Sterling, Illinois	Classification and Compensation	2015
Vernon Hills	Public Works Department Analysis	2015
Waukesha, Wisconsin	Classification and Compensation, Job Descriptions	2015
Waupaca, Wisconsin	Job Descriptions	2015
Westmont, Illinois	Compensation	2015
Baraboo District Ambulance Service, Wisconsin	Compensation	2014
Carpentersville, Illinois	HR Analysis	2014
Crest Hill, Illinois	Classification and Compensation	2014
Cross Plains, Wisconsin	Classification and Compensation, Job Descriptions	2014
Eau Claire, Wisconsin	Strategic Plan	2014
Hainesville, Illinois	Classification and Compensation, Job Descriptions	2014
Lodi Utilities, Wisconsin	Classification and Compensation	2014
Lodi, Wisconsin	Classification and Compensation	2014



Richton Park, Illinois	Classification and Compensation, Job Descriptions	2014
Wood Dale Park District, Wood Dale, Illinois	Classification and Compensation	2014



City of University City  
6801 Delmar Blvd.  
University City, MO 63130

## Response to Request for Proposal Employee Compensation and Classification Analysis Study



Paypoint HR, LLC  
695 Santa Maria Lane  
Davidsonville, MD 21035  
(443) 336-4272  
(443) 926-9930 FAX

Submitted on  
March 9, 2018 - 190



March 9, 2018

City of University City  
6801 Delmar Blvd  
University City, MO 63130

Dear Ms. Cannon,

Paypoint HR, LLC is pleased to present our response to the City of University City's RFP for an Employee Compensation and Classification Analysis Study. Paypoint HR has the staff and experience to serve University City with the knowledge and expertise needed to fulfill all requirements in the RFP within the time period specified. We will conduct the prescribed internal and external compensation study, wage and benefit, and communicate the findings and our recommendations to all stakeholders. Excellence, fairness, clarity, and transparency will be the guiding principles we will utilize in this endeavor.

Bidder's contact information as requested:

Paypoint HR, LLC  
695 Santa Maria Lane  
Davidsonville, MD 21035  
E-Mail: Rick@PaypointHR.com  
Telephone number: (540) 815-7837  
Fax number: (443) 926-9930

As project manager, Mrs. Karin Campbell will serve as the primary contact by and between Paypoint HR and your office. Mrs. Campbell's contact information is as follows:

Karin Campbell, SPHR, SHRM-SCP  
695 Santa Maria Lane  
Davidsonville, MD 21035  
E-Mail: Karin@PaypointHR.com  
Telephone number: (443) 336-4272

If you have any questions, please feel free to contact us. Our response to this RFP is valid and binding for a period of ninety (90) days from the date and time of the bid opening. We look forward to working with the City of University City on this important project.

Sincerely,



Karin VM Campbell

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## 1. Listing of Firm Background and Representative Clients

Paypoint HR, LLC (Consultant) is responding to the City of University City (City, Client) request for proposals from qualified consultants to provide Consultant Services for an Employee Compensation and Classification Analysis Study. The purpose of the study is to help the City to be recognized as an employer of choice in the area by providing a viable cost effective and competitive pay structure. The study must measure and provide analysis on base salary pay/step plans in addition to benefits for the City's 260 full-time positions including 79 commissioned police officers. Job analysis, job evaluation and updated ADA and FLSA compliant job descriptions are included in our fixed price proposal offering.

The official name and address of firm:

Paypoint HR, LLC  
695 Santa Maria Lane  
Davidsonville, MD 21035

Paypoint HR is an independent Limited Liability Company registered in the State of Maryland who provides the public-sector consulting services on a national level. Our Federal Tax Identification number is: 47-5329087.

Karin Campbell and Dr. Rick Campbell are legally authorized to represent Paypoint HR and will serve as the main contacts for the project.

**Project Manager - Primary Contact**  
Karin Campbell, SPHR, SHRM-SCP  
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Davidsonville, MD 21035  
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Fax number: (443) 926-9930

Paypoint HR, LLC is an innovative, cost effective and technologically advanced solution for the public sector's need to provide internally equitable and externally competitive pay plans. We are an independent Woman Owned Small Business (WOSB) that has been assisting the public sector achieve their pay plan objectives since 2012. We are located in Davidsonville, Maryland and in close proximity to the US Naval Academy, the Maryland State Capitol, and the United States Capitol.

Our overall approach to the field is unique. Our founding members hail from different practice areas related to classification and compensation. These specialty fields include legal compliance, research analytics, business strategy, and human resources. The common denominator that brings us together is helping our clients recruit and retain quality employees. We do this by collaborating on each project to give our clients strategic recommendations for achieving their goals. We believe we are the only firm that brings together experts from multiple specialty areas to design custom classification and compensation plans that give our clients a competitive edge in the labor markets where they compete.

Our team includes recognized experts in human resource management and understands that while we follow established standards, there is not a "one size fits all" solution to compensation management. The way we look at data is more thorough than our competitors. While we use "standard" calculations for determining pay, we also have the ability to create ad-hoc reports that meet specific Client needs. Our in-house attorney helps develop compliant job descriptions and pay plans based on the most current regulations. Clients benefit from the legal review and appeals processes through a reduction in grievances and an improved sense of equity. Our recommendations take into consideration the business and operational side of organizations.

We test our recommendations to ensure they are following sound business practices and will be a solid foundation for our clients going forward. The recommendations we make are intended to produce a structured program that gives ongoing guidance on how to improve an organization's ability to recruit, reward, motivate, and retain talent in a competitive environment. Specifically, we have developed an approach and methodology that: focuses on market competitiveness; recognizes that compensation is comprised of more than just base pay levels; reflects changes in recent compensation trends and strategies; designs custom solutions that take into account the diversity of needs present within the Client's organization and allows the Client to select the components and options that best meet their overall needs.

Paypoint HR has developed proprietary cloud-based software to conduct job analysis, Position Vantage Point (PVP). This software helps update the job descriptions with the input from employees. Because employees help design their job descriptions and their results are saved in a separate secure file, it reduces the likelihood of grievances related to classification and also acts as a legal defense in the event of a dispute.

Paypoint HR, LLC realizes that the employees are the most valuable asset and will be treated accordingly. By including employee input in the project, it is our experience that they feel "heard" and "valued." As such, they will be more likely to find the pride and fulfillment that public service lends. This forward-thinking philosophy ensures you will be seen as a great place to make a career as well as make a living.

### Assessment of Needs

Paypoint HR has taken time to review conditions that relate to classification and compensation and found University City to be transparent in its salary-based pay. The City has tried to maintain relevancy with regard to its salary scales by making annual COLA adjustments. The City tries to avoid compression by bringing in new hires at the beginning step for their pay grade unless approved by the City Manager. Even with these positive aspects, each employer has its own unique challenges. Obstacles the City has possibly experienced with regard to its ability to attract, motivate, and retain employees are:

- Proximity to St. Louis and a highly competitive labor market.
- Increase in crime rates;
- Employee turnover,
- Need for succession planning;
- Legal/compliance concerns,



- Changes in vendors and software which take time away from other issues;
- Lack of effective communication across the organization and the feeling of siloed departments;
- A diverse population,
- Increase in community demands and expectations for service offerings paired with limited resources to quickly adapt,
- Reduced federal funding & grant funds expiring;
- Difficulty recruiting qualified individuals for certain positions (Finance, Emergency Services and Inspections);
- Internal and external pay inequity;
- Perceived pay compression;
- Lack of methodology for career progression; and,
- Adjustments to existing plan have been reactionary, raising questions on the integrity of the plan.

These obstacles are independently problematic and collectively require a change from a tactical management style to a strategic management philosophy. We believe developing a long-term strategy for recruiting and retaining employees is the true intent of this RFP. Paypoint HR, LLC understands we will be working with the Human Resources Department, key leadership staff, and stakeholders (Project Team) to validate the scope of services, methodology, timeliness, and other deliverables. Paypoint HR has 5 senior staff ready to be deployed for this project and has the resources to confidently provide the City with exceptional service. We anticipate three (3) to on-site visits, but we remain flexible to meet the needs of the client. Paypoint HR will give Human Resources a request for information letter listing all of the data needed to begin the study. It is the responsibility of the Human Resources staff to gather the information and provide it to Paypoint HR. Additionally it will be the job of Human Resources staff to assist in choosing comparator organizations and benchmark positions. During the analysis, Human Resources staff will need to aid in scheduling meetings with the project team, employees and managers. We are planning that one meeting will be used to kick-off the project and to coordinate activities with the project team, one for briefing sessions, one for focus groups and one to present the findings of the study. Our communication plan and Agile work philosophy will ensure the project stays on schedule, begins and is completed on time, and meets with the expectations set forth by the City.

Comprehensive List of Recent Classification & Compensation Project Experience:

- NASA Federal Credit Union
- NASA Goddard Space Flight Center
- Prince George's County Memorial Library System, Maryland
- Rockingham County, Virginia
- City of Radford, Virginia
- City of Bethlehem, Pennsylvania
- Northampton County Public Schools, Virginia
- City of Glenpool, Oklahoma
- City of Milford, Delaware
- Town of Front Royal, Virginia
- Montessori Regional Charter School, Erie, Pennsylvania

- Durham Public Schools, North Carolina
- Township of Shelby, Michigan
- Village of Tinley Park, Illinois
- US Department of Agriculture
- Prince Georges County Public Schools, Maryland
- Mid America Regional Council
- Anne Arundel County Public Schools, Maryland
- Department of Veteran's Affairs Federal Credit Union
- WW II Memorial Committee
- National Republican Senatorial Committee & Democratic Senatorial Committee
- Guadalupe Center, Inc. Plaza de Ninos Preschool
- Easter Seals Midwest
- St. Mark Child and Family Development Center, Missouri
- Raytown School District, Missouri
- Independence School District, Missouri
- Center School District, Missouri
- Kansas City Public Schools
- The Family Conservancy, Missouri
- The YMCA of Greater Kansas City
- Children's Therapeutic Learning Center, Missouri
- Grandview School District, Missouri
- Operation Breakthrough, Missouri

**References**

**Table 2 – References**

Contact Name	Address	Contact Info
<b>Liz Smith</b> Mid-America Regional Council Non-Profit Association of Cities and Counties	600 Broadway, Suite 200 Kansas City, MO 64105	(816) 701-8348 LSmith@MARC.org
<b>Patrick Coronado</b> NASA Goddard Space Flight Center Federal Government	NASA GSFC Code 606.3 Bldg 28 Rm W186B Greenbelt, MD 20771	(301) 286-9323 Patrick.L.Coronado@NASA.gov
<b>Jane Binder</b> Chief Operating Officer Montessori Regional Charter School	370 West 26th Street Erie, PA 16506	(814) 833-7771 x103 JBinder@MRCSErie.org
<b>Lisa Carmean</b> Human Resources Administrator City of Milford	10 S.E. 2 <sup>nd</sup> Street Milford, DE 19963	(302) 424-3712 x1310 LCarmean@Milford-DE.gov
<b>Julie Bush</b> Director of Human Resources Town of Front Royal	102 E. Main Street, 2 <sup>nd</sup> Floor Front Royal, VA 22630	(540) 635-3929 JBush@FrontRoyalVA.com
<b>Brook Thomas</b> Chief Financial Officer Northampton County Public Schools	7207 Young Street Machipongo, VA 23405	(757) 678-5151 BThomas@ncpsk12.com

Additional references are available upon request.

## 2. Listing of Resumes of Staff to be Assigned to the Project

Paypoint HR's personnel bring several decades of experience of providing Employee Total Compensation Plan Analysis and Recommendations to the public sector and bring this experience to the client. In our response to the Statement of Work, we explain in detail our business history, people, and processes to show the level of resources we bring to the client.

We are members of WorldatWork and the Society for Human Resource Management. Our personnel keep abreast of new and emerging trends through continuing education in their respective fields and collaborate on each project to bring best practices to our recommendations. Our personnel are well respected and have served as speakers for industry associations, financial organizations, universities and more. Our personnel are also members of industry organizations and serve on the Board for several groups. We have industry data readily available for use in our assessments. Information we have access to include the most recent survey reports conducted by industry associations, updates to regulations on a federal and state level, as well as latest trends and best practices. We anticipate using four to five surveys in each study but are flexible to include more if the client has specific survey sources it would like us to use. We feel our expertise, processes, people, survey data library, and proprietary cloud-based software distinguish Paypoint HR from other contractors and will help the client reach its Compensation Study goals.

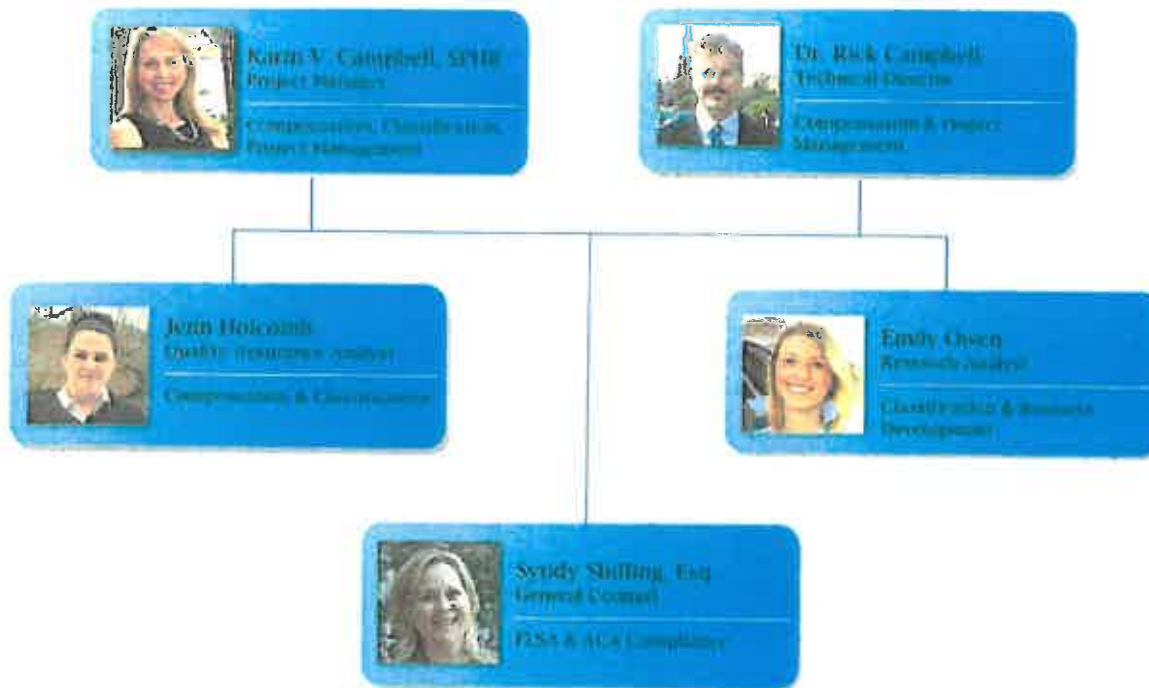


Figure 1 - Organization Chart

We have extensive experience working with Boards of Trustees, Councils, Board of Supervisors, Unions, and Boards of Directors. Our methodology is built on working with our clients and their employees to make appropriate, project-focused recommendations and then staying with the Project Team to see the recommendations are put into place. Our clients have peace of mind knowing the key to our success is ensuring implementation of recommendations. We will see the project through to implementation by meeting project goals and offering excellent customer support beyond what is listed in the RFP.

Paypoint HR is prepared to begin work immediately upon award of the contract and has five (5) FTE staff positions that can be devoted to fulfilling the requirements of this RFP. Our current work load allows us to commit staff members to the successful completion of the project. We welcome the active participation of the project team throughout the entire study, but understand that they will be engaged with other priorities as well. Paypoint HR expects support from the client in communication with key staff, setting up meetings, providing meeting resources as well as establishing reporting relationships, milestones and timelines.



**Karin Campbell, SPHR, SHRM-SCP**  
Bachelor of Science in Business Marketing, University of Maryland

Mrs. Karin Campbell has led Human Resource initiatives for more than 20 years. She has helped over 700+ employers and 15,000 employees with the development and delivery of customized HR solutions for employee management programs; conducting labor cost analysis of employee administration, benefits, retirement, workers' compensation, federal, state, and local taxes; budgeting for human capital including recruiting, onboarding, benefits, risk management, training, and compliance; and planning, design and implementation of payroll administration, health, dental, vision, life, and AD&D insurance, pension as well as ancillary benefits within a limited timeframe to large workforces.

She has consulted with clients and their employees on complicated employment topics. Her responsibilities also include development and maintenance of compliance and risk management programs. She has taught OSHA compliance as an adjunct professor. Currently she holds SPHR and SHRM-SCP designations and serves on the Board for the ASHRM chapter. Karin strong understanding of current trends in the benefits industry. Karin worked from 1995-2002 for HRLogic, Inc., a wholly owned subsidiary of Fidelity Investments. Most recently Karin owned her own HR firm, Alpine HR, from 2003 until 2012, when she sold her business. In 2013, Karin along with her husband, Rick formed Paypoint HR, an HR consulting firm which specializes in employee compensation for both private and public-sector concerns.

Karin has worked on the following projects; NASA Federal Credit Union, NASA Goddard Space Flight Center, Prince George's County Memorial Library System, Maryland, Rockingham County, Virginia, City of Radford, Virginia, City of Bethlehem, Pennsylvania, Northampton County Public Schools, Virginia, City of Glenpool, Oklahoma, City of Milford, Delaware, Town of Front Royal, Virginia, Montessori Regional Charter School, Erie, Pennsylvania, Durham Public Schools, North Carolina, Township of Shelby, Michigan, Village of Tinley Park, Illinois, US Department of

Agriculture, Prince Georges County Public Schools, Maryland, Mid America Regional Council, Anne Arundel County Public Schools, Maryland, Department of Veteran's Affairs Federal Credit Union, WW II Memorial Committee, National Republican Senatorial Committee & Democratic Senatorial Committee, Guadalupe Center, Inc. Plaza de Ninos Preschool, Easter Seals Midwest, St. Mark Child and Family Development Center, Missouri, Raytown School District, Missouri, Independence School District, Missouri, Center School District, Missouri, Kansas City Public Schools, The Family Conservancy, Missouri, The YMCA of Greater Kansas City, Children's Therapeutic Learning Center, Missouri, Grandview School District, Missouri, Operation Breakthrough, Missouri.

Karin's expertise has been utilized in studies that involve:

- **Employee Outreach** - She has developed time tested approaches to gaining employee buy in through effective communication and involvement of staff at all levels. She has created formats for briefing sessions, orientations, and focus groups that follow accepted industry protocol and takes into account both the qualitative and quantitative aspects of data collection. Her approach has allowed for better understanding of the nuances within organizations and uses it to formulate recommendations and overcome obstacles that positively impact acceptance.
- **Policy Design and Implementation** - She has created a process methodology for implementation of classification and compensation recommendations. The flow of the process lends itself to clear transfer of administration and maintenance from plan adoption through to long-term application.
- **Communication Plans** - She has led successful projects by creating communication plans with the input of each client to recognize project milestones and progress. She has created relationship reporting to ensure projects are completed on time and within budget.
- **Business Strategy** - She analyzes the strengths, weaknesses, opportunities, and threats faced by each client and the community they serve to incorporate resources into the final recommendations that maximizes return. She has helped clients face challenges in gaining the financial commitment necessary to adopt and implement recommendations.



**Dr. Rick Campbell**  
Ph.D. in Engineering Science and Mechanics, Penn State University  
Bachelor of Science in Applied Mathematics, University of Virginia

Dr. Rick Campbell's extensive education and experience in the field of mathematics has enabled him to understand highly technical issues. Because he has managed both internal and external clients, he has developed the ability to take the most advanced problems and convert them into easily understood terms and processes. He has applied this experience to the field of compensation and classification for the past 5 years.

He has worked for NASA GSFC, GE Aircraft, and Lockheed Martin Space Systems among others. His roles included Team Lead, Project Manager and Principal Engineer.

Dr. Campbell holds 7 U.S. and international patents for his creative ideas on product and process improvement. Rick has experience with Lean Six Sigma for both service organizations and manufacturing organizations. He brings his unique skills to Paypoint HR in order to improve the accuracy of our research findings and recommendations.

Rick has worked on the following projects; NASA Federal Credit Union, NASA Goddard Space Flight Center, Prince George's County Memorial Library System, Maryland, Rockingham County, Virginia, City of Radford, Virginia, City of Bethlehem, Pennsylvania, Northampton County Public Schools, Virginia, City of Glenpool, Oklahoma, City of Milford, Delaware, Town of Front Royal, Virginia, Montessori Regional Charter School, Erie, Pennsylvania, Durham Public Schools, North Carolina, Township of Shelby, Michigan, Village of Tinley Park, Illinois, US Department of Agriculture, Prince Georges County Public Schools, Maryland, Mid America Regional Council, Anne Arundel County Public Schools, Maryland, Department of Veteran's Affairs Federal Credit Union, WW II Memorial Committee, National Republican Senatorial Committee & Democratic Senatorial Committee, Guadalupe Center, Inc. Plaza de Ninos Preschool, Easter Seals Midwest, St. Mark Child and Family Development Center, Missouri, Raytown School District, Missouri, Independence School District, Missouri, Center School District, Missouri, Kansas City Public Schools, The Family Conservancy, Missouri, The YMCA of Greater Kansas City, Children's Therapeutic Learning Center, Missouri, Grandview School District, Missouri, Operation Breakthrough, Missouri.

Rick's knowledge heavily influences the following areas of the study:

- **Performance Based Pay** - He has built pay plans that incorporate performance metrics and translates them into fair pay based on relevant goals. His plans maintain objectivity and are multi-faceted. He has established performance review processes and standards for merit-based compensation pay. He has converted organizations to pay-for-performance that desired merit pay programs and were limited by existing policy and structures.
- **Big Data and Research Analytics** - He has worked on projects that have required large data sets and has created the format to collect and manage the data that maintains

integrity and validity. He has engineered programs that are user friendly yet robust in their functionality and interpolates data into meaningful information to a granular level.

- Trends analysis - He has reviewed and analyzed data that looked for patterns and correlation to determine if they are valid indicators for comparison. He has looked at causality and correlation links to consider potential for predictability.
- Study Validity - He has determined appropriate metrics for comparison in the selection of comparator organizations and benchmark positions to ensure relevancy of findings.
- Financial Impact - He has applied both short-term and long-term implications of recommendations for clients to assist in the ability to project necessary funding and revenue sources.



**Emily Owen**

Bachelor of Science in Business Marketing, Mount St. Mary's University

Emily has her education and experience in business. She has organized and held leadership roles in team based projects over the last two years. These experiences have provided her with organization skills as well as given her a customer service oriented approach to our studies. She brings a well-rounded, fresh viewpoint to the team. Her detailed research and application of data meet customized client specific goals. The use of her customized analysis improves validity of recommendations insuring implementation success.

Emily has worked on the following projects; Rockingham County, Virginia, PG County Memorial Library System, Maryland, City of Radford, Virginia, City of Bethlehem, Pennsylvania, Northampton County Public Schools, Virginia, City of Glenpool, Oklahoma, City of Milford, Delaware, Town of Front Royal, Virginia, Village of Tinley Park, Illinois, Township of Shelby, Michigan, Montessori Regional Charter School, Erie, Pennsylvania, Durham Public Schools Durham, North Carolina.

Emily's business experience has aided in her focus in the following areas:

- Data Collection and Evaluation - She has compiled accurate and timely data for determination of comparator organization validity in external market surveys. She has aided in the evaluation of comparators that have produced substantiated and defensible findings.
- Survey Response - She has formulated data into workable central databases, and sorted data in a way that point out anomalies and confirms the quality of the data.
- Standardization of Policy - She has been involved in projects that required the development of standards across the large organizations consisting of many functional divisions in the application of internally equitable classification and compensation plans.
- Creation of Policies - She has uncovered the need for creation of policy in the use and maintenance of pay plans and written policies that were accepted and enforced.





**Jennifer Holcomb**

Bachelor of Science in Health Sciences, San Diego State University  
Associates Degree Nursing, MiraCosta College

Jennifer Holcomb came to Paypoint HR to pursue her passion of helping others. She has traveled to clients to help conduct focus groups and introduce information about our services. She regularly works on surveys to collect data from comparable localities to ensure our final reports are thorough and accurate. Her dynamic revisions and edits of client job descriptions ensures standardization across the organization. She is currently studying and preparing to take the SHRM SCP exam in the spring and looking forward to applying her knowledge with clients in the future.

Jennifer has worked on the following projects; Rockingham County, Virginia, PG County Memorial Library System, Maryland, City of Radford, Virginia, City of Bethlehem, Pennsylvania, Northampton County Public Schools, Virginia, City of Glenpool, Oklahoma, City of Milford, Delaware, Town of Front Royal, Virginia, Village of Tinley Park, Illinois, Township of Shelby, Michigan, Montessori Regional Charter School, Erie, Pennsylvania, Durham Public Schools Durham, North Carolina.

Jennifers expertise in quality assurance has aided in work projects involving:

- **Classificaiton** - She has reviewed, analyzed and updated job descriptions, and reviewed results from job analysis questionnaires to conduct job evaluations and assist in the creation of job family heirarchies within departments.
- **External Market Survey** - She has been instrumental in the development, dissemination, communication and collection of external market surveys to collect pay and benefit data from comparator organizations. Her follow through improves study results by generating a strong database of information.
- **Project Liaison** - She has worked with members of the project team to coordinate activities that help reach study milestones.
- **Reporting** - She has designed clear and concise reports that communicate complex concepts. She has reviewed findings to select support material that portrays an accurate picture of the evalution of the study from baseline analysis through to final study deliverables.



**Syndy J. Shilling, Esq.**

Juris Doctor, University of Baltimore School of Law  
Master of Science in Educational Leadership, The John Hopkins University  
Master of Arts in English and Rhetoric, University of Maryland  
Bachelor of Arts in English Education, University of Maryland

Mrs. Syndy J. Shilling, Esq., is an attorney and professor for the University of Maryland. She oversees operations of the student legal aid clinic and teaches pre-law. She serves on the committee responsible for review and development of new and revised policies related to Title IX and equity, diversity, and inclusion issues. She assists students in Code of Conduct and Title IX proceedings.

Syndy worked in the public sector for over 11 years. Syndy's responsibilities included legal review of all job descriptions, compensation studies and classification reviews for instructional positions (teachers, teacher assistants), administrative positions (school leadership roles, central office positions), and non-instructional (food service, maintenance, school resource officers, bus drivers, and management). During this time, she was responsible for legal review of all human resources policies and administrative regulations.

Syndy has worked on the following projects; NASA Federal Credit Union, NASA Goddard Space Flight Center, Prince George's County Memorial Library System, Maryland, Rockingham County, Virginia, City of Radford, Virginia, City of Bethlehem, Pennsylvania, Northampton County Public Schools, Virginia, City of Glenpool, Oklahoma, City of Milford, Delaware, Town of Front Royal, Virginia, Montessori Regional Charter School, Erie, Pennsylvania, Durham Public Schools, North Carolina, Township of Shelby, Michigan, Village of Tinley Park, Illinois, US Department of Agriculture, Prince Georges County Public Schools, Maryland, Mid America Regional Council, Anne Arundel County Public Schools, Maryland, Department of Veteran's Affairs Federal Credit Union, WW II Memorial Committee, National Republican Senatorial Committee & Democratic Senatorial Committee, Guadalupe Center, Inc. Plaza de Ninos Preschool, Easter Seals Midwest, St. Mark Child and Family Development Center, Missouri, Raytown School District, Missouri, Independence School District, Missouri, Center School District, Missouri, Kansas City Public Schools, The Family Conservancy, Missouri, The YMCA of Greater Kansas City, Children's Therapeutic Learning Center, Missouri, Grandview School District, Missouri, Operation Breakthrough, Missouri.

Syndy's experience and knowledge has aided in the following areas:

- Compliance / Regulatory Changes - She has kept up to date on new regulations that have affected the management of classification and compensation within client organizations.
- Education of the Implication of New or Changing Regulations - She has conducted training sessions for project leaders to convey important topics that may impact the administration of human resources.
- Union Negotiations - She has been the lead attorney in Collective Bargaining Agreement negotiations.
- Determination of Internal Appeals - She has rendered final determinations in employee appeals.

### 3. Outline of Firm Experience with the Subject Matter of the Assignment

**Table 1 – Recent Project Experience**

Client Name and Location	Start Date	End Date	Fees	Role of Firm and Responsibilities
Rockingham County, Virginia	2017	Current	\$38,500	Job Classification & Compensation w/ Police & Fire
PG County Memorial Library System, Maryland	2017	2017	\$32,500	Job Classification & Compensation w/ Police & Fire
City of Radford, Virginia	2017	2017	\$32,500	Job Classification & Compensation w/ Police & Fire
City of Bethlehem, Pennsylvania	2017	2017	\$37,500	Job Classification & Compensation w/ Police & Fire
Northampton County Public Schools, Virginia	2017	2017	\$37,500	Job Classification & Compensation
City of Glenpool, Oklahoma	2017	2017	\$32,500	Job Classification & Compensation w/ Police & Fire
City of Milford, Delaware	2017	2017	\$29,750	Job Classification & Compensation w/ Police
Town of Front Royal, Virginia	2017	2017	\$25,750	Job Classification & Compensation w/ Police
Village of Tinley Park, Illinois	2016	2016	\$37,500	Job Classification & Compensation w/ Police & Fire
Township of Shelby, Michigan	2016	2016	\$35,000	Job Classification & Compensation
Montessori Regional Charter School, Erie, Pennsylvania	2016	2016	\$25,000	Job Classification & Compensation
Durham Public Schools Durham, North Carolina	2016	2017	\$51,450	Job Classification & Compensation
Mid-America Regional Council Kansas City, Missouri	2016	2016	\$29,100	Job Classification & Compensation
NASA Goddard Greenbelt, Maryland	2015	2016	\$54,145	Compensation & Technical Analysis

Our knowledge of the public-sector stems from years of experience working with clients in establishing total compensation plan designs and recommendations. We stay up to date on relevant industry trends and regulations. We consider best practices for pay grades, ranges, bands and job classifications. A few of the projects we are most proud of include:

**City of Milford** - Job Classification and Compensation Study

The Classification and Compensation study included approximately 65 job titles occupied by approximately 110 full-time employees. Positions included single or multiple incumbent positions in a job series (such as Electric Line Technician I, II, III), also including Union employees. The police department was included in the study as well. Paypoint HR, LLC considered the objectives of the City and recommended changes necessary to establish and maintain an equitable and easy to administer classification and compensation system, as well as benefits, for the City's full-time positions. Collectively Bargained Units considered in the study include the General Teamsters Local Union 326 (Teamsters LU 326) and the International Brotherhood of Electrical Workers (IBEW) Union employees. Paypoint HR successfully participated in labor negotiations with the IBEW.

The scope of work was as follows: Implementing updates to the City of Milford's current Classification and Compensation Plan; Ensuring positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together; Updating Job descriptions; Providing salaries commensurate with assigned duties; Clearly outlining promotional opportunities and provide recognizable compensation growth; Providing justifiable pay differentials between individual classes; and, Verifying that the recommendations are competitive within relevant labor markets. Paypoint HR also created a performance evaluation system.

Challenges faced by the City of Milford included the recent formation of unions, service demands from residents outside of the City limits, and a growing diverse population. Neighboring Cities were much larger and have a better revenue base which made attracting and retaining quality employees difficult.

**NASA Goddard Space Flight Center** - Staffing Level and Cost Analysis

Paypoint HR was tasked with the duty of assisting NASA in the analysis and projection of costs associated with staffing various projects. Our recommendations were incorporated in reports used directly in the planning and implementation of projects.

**Town of Front Royal** - Classification and Compensation Study Including Public Sector and Private Utility and Business Professional Sectors

The specific goal of the Classification and Compensation study was for the Mayor and Town Council to establish an equitable compensation system that treats full and part time employees fairly. Paypoint HR was tasked with preparation and evaluation of the Town's existing plan covering approximately 161 full-time employees and approximately 16 part-time employees, including Police. The study took into consideration the duties, responsibilities, education

requirements, and other relevant factors of each of the Town's classifications. Job descriptions were revised, and new job descriptions were created based on the findings from the Position Vantage Point (PVP) job analysis questionnaire. The local labor market was surveyed to ensure that the Town's overall package of compensation and benefits was competitive. Pay ranges were created along with recommendations concerning ongoing pay adjustments, ongoing pay scale maintenance, future market adjustments, demotions, promotions and benefits. Front Royal faced the challenge of losing trained staff to higher paying municipalities closer to the Northern Virginia region.

**Montessori Regional Charter School** - Compliance and Compensation Study

Enrollment at the time of the study was 460 students and growing. The school is a non-union facility employing a total of 66 employees including 28 full-time Elementary School Teachers, 24 Academic Paraprofessionals, 4 Academic Administrators, and 10 Operations employees. This classification and compensation study included benefits and pay for performance. Comprehensive surveys like this established a credible pay structure that is fair for the work completed and strategically positions MRCS competitively in the labor market. The desired result was the improved ability to attract and retain quality staff that perform at optimal levels to meet the growing demands of the community.

Montessori Regional Charter School is located in an area where teacher unions have a strong presence and found itself having to compete with strong total rewards packages from the associated collective bargaining agreements.

**City of Glenpool** - Compensation Study

Paypoint HR was tasked with the preparation and evaluation of the City's existing compensation plan covering approximately 83 Full-time and 3 part-time employees in roughly 52 job classifications. Employees from both the Fraternal Order of Police Lodge 133 (FOP Lodge 133) and International Association of Fire Fighters Local 2990 (IAFF Local 2990) were included in the study. The study took into consideration the duties, responsibilities, education requirements, and other relevant factors of the City's classifications. Job descriptions were revised, and new job descriptions were created where necessary based on the findings from the Position Vantage Point (PVP) job analysis questionnaire. The local labor market was surveyed to ensure that the overall package of compensation and benefits is competitive. Pay ranges were created along with recommendations concerning ongoing pay adjustments, ongoing pay scale maintenance, future market adjustments, demotions, and promotions.

Glenpool had been a quiet town outside of Tulsa. In recent years, the City found itself the fastest growing community in the area and needed to adjust its market position to attract quality staff.

**Northampton** - Staffing Level, Economic Comparison, and Compensation Study

Paypoint HR provided a comprehensive compensation review and update of the classification/salary system for the school systems' employees. The intent of the study was to provide the Superintendent and Board with a process for ascertaining equitable value of

position classification on salary scales. The study compared compensation for teachers, administrators, and classified positions to compensation scales of school systems identified to be valid comparators to Northampton County Schools (NCPS). The study included approximately 294 employees within 43 distinct positions. Staffing levels were reviewed and analyzed by department and job title. Recommendations were made for adjustments where needed.

Unique challenges Northampton faced included generational poverty, a rural agrarian culture, the effect of seasonal tourism on the economy, and diversity.

**Durham County Schools** - Compensation and Market Comparability Study

The specific objective of the study was to conduct a credible Compensation and Market Comparability Analysis that takes into consideration changes in the work environment; ensures positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills and abilities are classified together; provides salaries commensurate with assigned duties; provides justifiable pay differential between individual classes; and maintains currency with relevant labor markets. The project considered salary scales for support and administrative office/staff as well as instructional supplements. The study encompassed 5,000 staff members consisting of support personnel, certified staff, and administrative / executive staff.

Employee outreach was included in the study and Paypoint HR met with employees for study orientations and focus groups. Unique challenges presented during the study were the negative perception of inner city public school's work environment and the growing popularity / competition of charter schools.

**City of Radford** - Classification and Compensation Study

Paypoint HR prepared an evaluation of the City's current classification and compensation plan. We conducted a full job analysis of City positions. Briefing sessions were held with employees to explain the scope of the project, their roles, the roles of supervisors, and anticipated deliverables. Job descriptions were updated, standardized, and reviewed for FLSA compliance. An external survey of the local labor market was conducted to ensure that the City's overall package of compensation was competitive. The City requested development of a revised compensation structure and assignment of positions within the new structure and implementation costs of the recommendations. A job classification structure was developed for assigning new positions to the compensation plan in an objective manner. Paypoint HR reviewed current human resources policies/procedures/practices that could affect the City's ability to compete in the labor market.

Radford is home to Radford University and is in close proximity to Virginia Tech. Radford is included in the Blacksburg, Christiansburg, and Radford metropolitan area and consequently faces challenges of a highly competitive labor environment.

**County of Rockingham** - Employee Classification and Compensation Study

Paypoint HR conducted an employee compensation and classification study of public and private employers who were providing equitable services, and based on the study, determined current position/job descriptions needed to be updated. We updated the descriptions and prepared a comparative analysis that identified the County's competitive position in the labor market. We provided a recommendation for salaries and salary ranges and, prepared recommendations for compensation procedures and policies.

Rockingham faced extreme difficulty in attracting and retaining quality staff. The County's seat is the incorporated City of Harrisonburg. The populations of both are very similar though Rockingham covers a much larger land area. Harrisonburg is home of James Madison University, and Eastern Mennonite University, who are also competitors for labor.

**City of Bethlehem** - Classification and Compensation Survey

This project consisted of a job classification and compensation survey of all non-represented full time, full-time contract, and seasonal employees; developed a pay-for-performance system suitable for the public environment; created and updated job descriptions; and made recommendations regarding the elimination of a 27th pay each decade.

The City of Bethlehem's non-represented employee workforce included 99 full time positions, 18 full-time contract positions, and 154 seasonal positions. The employee group study included variable educational levels that perform clerical, technical, management, professional, and executive duties.

It had been several decades since the last evaluation of compensation practices and policies were conducted. Since that time, inequities crept into the environment based on poor or missing policy, decentralized decision making, and a lack of sound organizational management. Paypoint HR's recommendations halted, and course corrected any inequities, both internal to the workforce and external as compared to employer contemporaries.

**Charter Township of Shelby** - Job Analysis and Compensation Study

The project consisted of the development of a comprehensive job analysis, a compensation study, and wage structure recommendations for approximately 75 job classifications. Involved were 105 employees in the UAW General Employee and UAW Supervisory collective bargaining units and the Township's nonunion Department Heads group. Each of these employee groups has its own wage structure which is overseen by a civil service commission, but ultimately approved by the elected Board of Trustees.

The development of a compensation strategy/policy for the Township, incorporated a comprehensive wage study and evaluation of the current wage structures. It considered both public and private employers and created a wage structure for job classifications based on market compensation data. Paypoint HR developed a plan to implement proposed wage structures and analysis of the financial impact of the proposed wage structures.

**Mid-America Regional Council** - Pay Plan Study / Consultation Services / Grant Compliance

The Mid-America Regional Council (MARC) is the metropolitan planning organization and association of city and county governments serving the bi-state Kansas City region. It is a public, nonprofit agency. MARC serves nine counties with 119 cities, including Cass, Clay, Jackson, Platte and Ray counties in Missouri; and Johnson, Leavenworth, Miami and Wyandotte counties in Kansas.

Paypoint HR assessed the structure of its indirect cost and fringe benefits management system to identify strategies to improve, augment and/or replace current practices to achieve key operational and management objectives to:

- Foster stability in indirect and fringe benefits allocation rates from year to year. Enable effective and active management of indirect costs and fringe benefits by limiting the delay between changes in actual expenses and the establishment of allocation rates.
- Ensure that indirect cost and fringe benefits rates are reasonable and competitive, as well as reflective of actual costs.
- Effectively and efficiently manage federal funds in concert with non-federal funds that often have lower indirect cost thresholds.
- Lessen or eliminate the impact of carryover of surplus/deficits (even and odd years).
- Maintain high level of efficiency and accuracy in indirect cost and fringe benefits accounting, budget, reporting and monitoring systems.
- Allocations are transparent, clear and easily communicated.
- Contribute to a comprehensive financial management reporting system
- More readily project and manage costs associated with employee benefits, such as:
  - Health insurance premiums established in middle of fiscal year (July 1)
  - Sick leave taken (75% charged to cost pool each pay period) - higher levels of employee absences due illness, pregnancy, family member, etc. occurred in 2015.
  - Position vacancies that reduce the base for the allocation.
  - Pension forfeitures applied (unvested funds become available when terminated employees withdraw their vested balances).
  - Jury duty and funeral leave that can vary greatly.
  - FICA and employer 401k match paid for terminating employees' gross pay due to accumulated accrued vacation and sick leave (25/50%) balances.

MARC was faced with the daunting task of standardizing classification and compensation across its 19 independently owned and operated Head Start member organizations.

**Department of Veteran's Affairs Credit Union** - Human Resource Administration and Consulting

We offered day-to-day administration of Human Resources, pay, benefits, and compliance support over the course of several years.



***Prince Georges County Memorial Library System*** - Comprehensive Classification and Compensation Study

Paypoint HR conducted a "best practices" review to identify library systems with best-in-class classification/compensation systems. We identified and addressed environmental factors that influence the classification/compensation systems in the library of the future. The following was outlined in the scope of work and included in the study; review organizational charts and current position descriptions, develop appropriate data collection instrument(s) for gathering information on all position descriptions, including staff interviews and job audits where necessary, recommend a new classification plan that might include; the creation of new classes, elimination of unneeded classes, consolidation of existing classes, creation of opportunities for employee mobility such as career ladders, and assignment flexibility to improve employee knowledge and skill, recommend job evaluation methodology that addressed internal relationships of job, classes that is consistent with the Library's overall values and priorities.

We applied the selected methodology to the job classes and develop a classification and grade structure. We educated the appropriate Library staff on the methodology used to create the study to ensure proper implementation and future application including reclassification process or development of new classifications.

We developed or revised position descriptions and/or classification specifications, as necessary, to ensure full compliance with the requirement of the Americans with Disability Act and reflect the appropriate FLSA status and uniformly reflect essential job functions, minimum qualifications, working conditions, and special responsibilities. In the interest of transparency and in conjunction with the designated management/labor study review team, we designed and developed a communication plan regarding the classification study to inform and educate all stakeholders including periodic updates on progress and direction. Paypoint HR prepared a final classification report with recommendations for a system that is affordable, sustainable, competitive and innovative.

We conducted a comprehensive analysis of the Library's current compensation program and identified issues including but not limited to recruitment, retention, salary compression, equity and propose implementation method to correct. We identified organizations, especially libraries, in the Washington/Baltimore area that are sufficiently similar to the PGCMLS in terms of mission, size, budget and labor force composition, to serve as comparators for the current as well as future PGCMLS compensation analysis. We developed and conducted an external assessment/compensation survey evaluating benchmark positions by comparing actual job content and duties to comparable positions in the identified comparator organizations. We measured compensation in terms of career earnings including; scale minimums and maximums, actual average salaries, periodic pay adjustments, career promotional progressions and other compensation factors that influence an employee's cumulative earnings during a normal career. We developed a report analyzing the results of the data from the internal and external assessments. We developed a comprehensive compensation plan for all Library employees based upon objective analysis and evaluation of job content that provided internal equity and was competitive.

A challenge faced by PGCMLS is that there are large surrounding library systems that prove difficult to compete with such as Montgomery County, Baltimore and Washington D.C. Another

difficulty faced by PGCMLS is that branches were being closed periodically for renovations and staff were tasked with duties outside of the scope of the duties they felt they were hired to perform.

### Tinley Park - Compensation and Benefits Plan Review and Analysis

The purpose of this project was to review the existing classification and compensation and benefits plan ("Pay Plan"), to ensure that select positions within the Village were internally equitable and externally competitive.

The study recognized changes in Village operations and staffing in the last several years that had affected the type, scope and level of work being performed. The objective of the study was to have a credible Pay Plan that recognized these changes; ensured positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills and abilities were classified together; provided salaries commensurate with assigned differential between individual classes; and maintained currency with relevant labor markets. The study was intended to improve the Village's strategies to attract and retain high-performing employees and to ensure the Village of Tinley Park is an "employer of choice."

The following tasks were specified in the scope of work; a salary survey of communities comparable to the Village of Tinley Park in size, population, economic climate and proximity, etc., that were collaboratively agreed upon by the Village and Paypoint HR. Paypoint HR also conducted salary surveys for similar positions within private sector businesses, also agreed upon by the Village. The salary study included the hours worked per week by employees in the various positions in an effort to consider both internal and external equity. Survey results detailed compensation and benefits processes, merit based or salary increases based on market wage adjustment. Paypoint HR developed recommendations that were externally competitive and internally equitable for each job classification.

A challenge faced by Tinley Park was its close proximity to Chicago and the highly competitive nature of the surrounding suburbs for labor. At the time of the study, Tinley Park was undergoing rebranding and a push for economic development initiatives. They desired a classification and compensation plan that would breath fresh air into the Villages' ability to keep and hire quality staff. The initial study was expanded to include the fire department.

#### 4. General Description of the Firms Approach to Completing the Project

Our methodology is comprehensive and encompasses all of the requirements specified in the RFP. Phase A focuses on the Classification/Job Analysis Component. Phase B focuses on the Compensation Component. The standard methodology we will use to conduct both phases of the study will follow the steps laid out in the flowchart (see Figure 2) and delineated below.

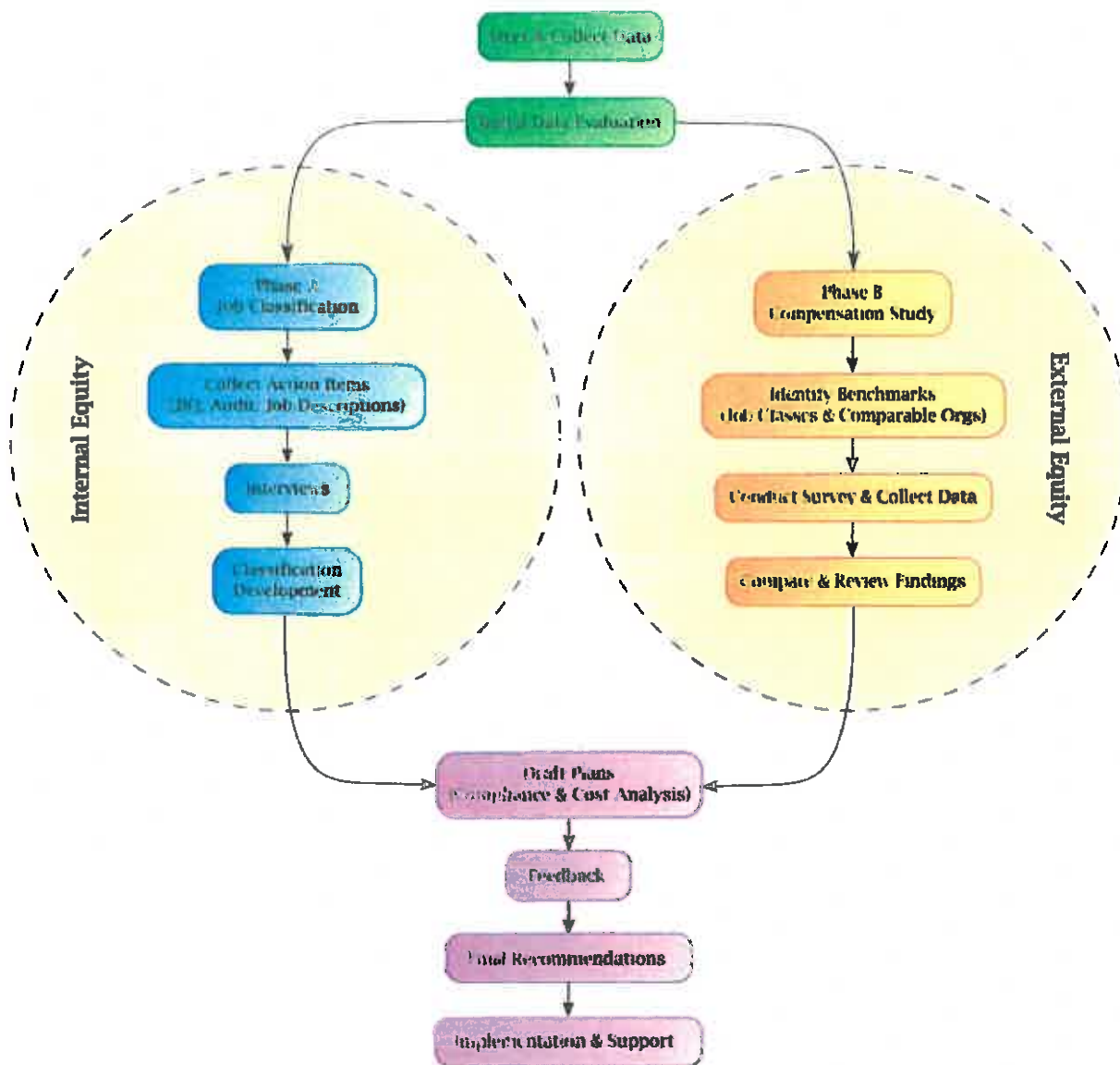


Figure 2 - Flow Chart



Paypoint HR plans to conduct the internal equity portion of the study prior to the external portion of the study though some activities will be conducted simultaneously. The reasons for this include:

- The description of the work performed and the requirements for that work are, in the minds of the employees and their supervisors, inextricably associated with the “worth of the work” or compensation, which is often a highly emotional issue. Separating the two phases of the study, even though elements of the phases may be conducted concurrently, tends to produce more objective results.
- The compensation review will be completed when there is a full understanding of the work required for the position, thereby ensuring that the data developed from the labor market and Client classifications are correct.

Paypoint HR uses an Agile philosophy and an expectation of excellence when approaching our projects. Based on the size and scope of each project, we determine the most effective utilization of resources and build our project team. We use secure, effective communication tools to safely and transparently share information. The Agile approach tends to take a people-centric perspective, implementing short, phases or steps that rely on ongoing feedback and continuously reshapes and refines the project path. The approach has proven successful over time and frees teams from using a cookie cutter approach to designing a custom work product. Using our Agile philosophy, we are able to offer faster turnaround and the dynamic ability to quickly adapt to changes.

#### Phase A – Classification/Competencies Component

- A. Project Kick Off
- B. Baseline Evaluation
- C. Collect and Acknowledge Job Descriptions and Actionable Reports
- D. Recommendations for the Classification Structure
- E. Classification Concept Analysis and Preliminary Allocation Development
- F. Job Class Description Development/Compliance Update
- G. Draft Job Class Description Review and Informal Appeal Process
- H. Generate an equitable Classification Plan and a Draft Interim Report

#### Phase B – Compensation Component

- A. Identify Market Salary Benchmarks, Targets, and Benefits
- B. Data Collection
- C. Analysis and Preliminary Data Review
- D. Draft Compensation Study Findings/Additional Analysis/Study Project Leaders Meetings
- E. Internal Relationship Analysis, Internal Alignment and External Prevailing Rates Comparison
- F. Compensation Structure and Implementation Plan Development
- G. Preparation of Draft Summary Reports, Final Reports and Deliverables including the first State Pay Equity Report to assure compliance
- H. Final Presentation, Training & Support

## 5. Process to be Used to Collect Data

### Phase A Classification/Competencies Component

We will look at both qualitative data and quantitative data throughout the compensation study. The purpose of statistical data allows us to capture a snapshot of the existing plan. This gives us a starting point to uncover areas of possible review and revision recommendations.

This phase of the assignment will result in the study of all classes that includes the comparison of classes within series and to other occupational levels within the organization. Study tasks include: project initiation and orientation, employee orientations, completion of Position Vantage Point by employees, desk audits by managers and/or Human Resources and interviews with employees/focus groups, the preparation of revised or new class specifications, and a review process for all employees included in the scope of the study.

#### Task A – Project Kick Off

The project initiation task is a two (2) stage activity phase which encompasses all the steps required to initiate the project. This task includes the following activities:

##### *Project Activities*

- Request pertinent materials prior to the project initiation meeting so that Paypoint HR has an understanding of the scope of the study, an understanding of client's current classifications, and is prepared to seek further relevant information during the initial meetings.
- Obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses. Identify current incumbents, and gather any other documentation to gain better understanding of the client's operations.
- Meet client staff to discuss project context and methodology, determine reporting relationships, and clarify project understanding.
- Initial review of relevant materials, including: (a) any previous projects, research, evaluations, or other studies that may be helpful to this project; (b) organizational charts for departments and divisions along with related job descriptions; (c) current position and classification descriptions, salary schedules, salary ranges, pay scales, payroll reports, and classification systems; (d) strategic business plans and budgets; (e) personnel policies and procedures; and (f) evaluation criteria.
- Reach an agreement on a schedule for the project including all assignments and project milestones/deliverables and deadlines dates for completion of the overall assignment.
- Establish an agreeable communication schedule while identifying potential challenges and opportunities for the study.
- Discuss the Client's strategic direction and the short-term and long-term priorities.
- Review any data provided by the Client that may provide additional relevant insight.

- Review internal career ladders in order to identify needs, make recommendations, and keep positions competitive in the market.
- Input budgetary data into our proprietary software
- Maintain open lines of communication.

**Task B – Baseline Evaluation**

Current Pay Plan					
Grade	Minimum	Midpoint	Maximum	Range	# of Employees
P-I	8.40	9.24	10.08	20%	0
P-II	12.00	13.43	14.85	24%	5

Employees at Minimum and Maximum by Pay Grade					
Grade	Employees	# at Min	% at Min	# at Max	% at Max
P-I	0	0	0%	0	0%
P-II	5	2	40%	0	0%

Employees Above and Below Midpoint by Pay Grade					
Grade	Employees	# < Mid	% < Mid	# > Mid	% > Mid
P-I	0	0	0	0	0%
P-II	5	2	40%	1	20%

Quartile Analysis (Count of Employees)					
Grade	Total	1 <sup>st</sup> Quartile	2 <sup>nd</sup> Quartile	3 <sup>rd</sup> Quartile	4 <sup>th</sup> Quartile
P-I	0	0	0	0	0
P-II	5	4	0	1	0

**Figure 3 - Baseline Evaluation**

The Baseline Evaluation Task evaluates the current system as outlined and includes the following activities:

- Conduct a comprehensive preliminary evaluation of the client’s existing position review process. Conduct any necessary question and answer sessions. Develop an accurate database of client’s employees for study and review data as well as career ladders. Understand the client’s approach to compensation and overall philosophy on attracting and retaining competent staff.
- Review the existing pay structure and processes to look for potential problems to be resolved. Determine the strengths and weaknesses of the current pay plan(s). Complete an assessment of the current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.
- Conduct a thorough review of all background materials related to the client’s classification system. Review information from the department head as well as

- incumbents. Conduct interviews as appropriate. Document accepted compensation and classification philosophy and budgets based on input from the Study Project Leaders and other key staff.
- Establish a baseline using tools such as Line of Central Tendency graphs and comparison of intended pay versus actual pay by department.
  - Gain understanding of employee recruiting and retention processes to uncover challenges given the local labor market and provide guidance on market positioning strategies.
  - Once a baseline is determined, establish the client's current position as compared to the local market using sources of data preferred by the client as well as Paypoint HR's resource library for consideration.
  - Look at goals for recruiting and retention with regards to sustainable budget amounts that will support recommendations on market position strategy.
  - Analyze budget data in our proprietary cloud-based software with consideration to existing pay and the desired market position.
  - Consider both current and anticipated information technology programs, software and staffing levels to support, implement, administer and maintain the recommendations given to the client by Paypoint HR.

Paypoint HR will incorporate the accumulated knowledge and understanding of the project gathered at this point into a main client file. Data will be collected throughout the project and will be housed in this central location.

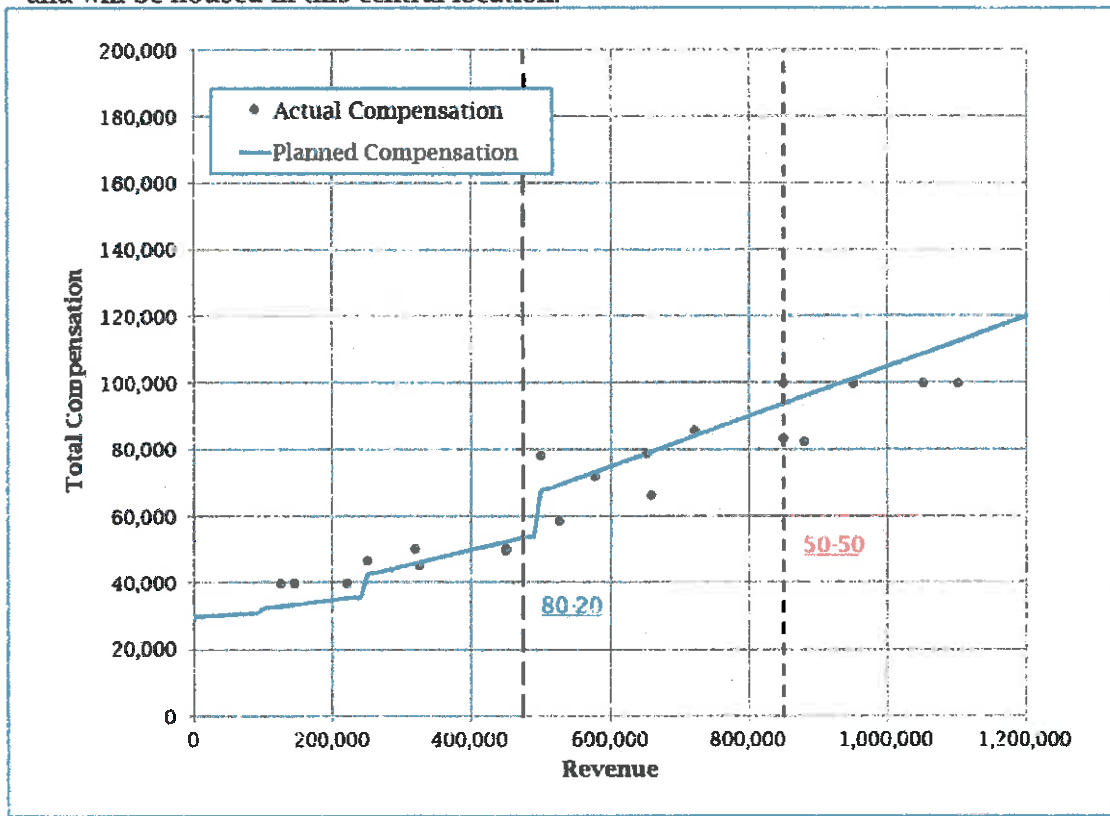


Figure 4 - Baseline Pay for Department by Employee



Primary Data File

The Primary Data File consists of all the combined per-position and per employee data accumulated and created during the project. It is initially established from the data provided by the client, such as:

Employee Name	Current Job Class Title	Base Salary Amount
Department	Job Class Code	Salary Range Number
Initial Hire Date	EEO Designation	\$ Range Midpoint
Performance Score	FLSA Designation	\$ Range Min/Max

Additional per-position information added or superimposed on the current data by Paypoint HR during the project may include:

New Job Class Title	New Job Class Code	Salary Range Number
\$ Range Minimum	\$ Range Midpoint	\$ Range Maximum
Job Evaluation Points	Benchmark Status	\$ Policy Group
Amount to Minimum	Implementation Amount	New Salary Amount
Above Maximum	Certification Pay Code	Assignment Pay Code
Compa-Ratio	Amount to Midpoint	Supervisory Differential

Class Code	Occupational Job Families and Job Classes
<b>1400</b>	<b>Public Works Series Facilities Maintenance and Craft Group</b>
1431	- Maintenance Supervisor
1432	- Parks Supervisor
1433	- Senior Skilled Craft Specialist
1434	- Skilled Craft Specialist
1435	- Maintenance Technician
1436	- Maintenance Technician Assistant
1437	- Parks Maintenance Specialist

**Figure 5 - Table of Existing Job Classes**

Schematic of Occupational Job Classes

Schematic of Occupational Job Classes (see Figure 5) is a file established at the completion of the job analysis and position classification section of the project with all of the organization's job classes designating:

Job Class Series	Job Class Groups
Job Class Titles	Job Class Codes
FLSA Designation	EEO Designation

Task C - Collect and Acknowledge Background Information on Positions

Task C of the project collects and acknowledges Position Vantage Point (PVPs) and supporting material. We utilize both a proprietary cloud-based job analysis tool (see Figure 6) and a hard copy version to collect data.

## Position Vantage Point

### Background

**First Name**  
David

**Middle Name**  
Richard

**Last Name**  
Campbell

**Job Title**  
Journeyman

**Job Category**  
Law Enforcement

**Status**  
 Full-Time     Part-Time

**Work Week (0 to 80 hours)**  
40

**Supervisor Name**  
Karin Campbell

**Job Description**

### Skill

**Complexity Question #1**  
*This position involves routine or repetitive tasks, processes, or operations involving the application of well-defined rules, procedures, policies, guidelines, and/or instructions.*

Strongly disagree  
 Somewhat disagree  
 Neither agree nor disagree (50/50)  
 Somewhat agree  
 Strongly agree

**Complexity Question #2**  
*This position involves generally standardized tasks, processes, or operations involving the choice of action within well-defined rules, procedures, policies, guidelines, and/or instructions*

Strongly disagree  
 Somewhat disagree  
 Neither agree nor disagree (63/60)  
 Somewhat agree  
 Strongly agree

**Complexity Question #3**  
*This position involves generally diversified tasks, processes, or operations involving the choice of action within well-defined rules, procedures, policies, guidelines, and/or instructions*

Strongly disagree  
 Somewhat disagree  
 Neither agree nor disagree (50/50)  
 Somewhat agree  
 Strongly agree

**Complexity Question #4**  
*This position involves occasionally complex and diversified tasks, processes, or operations involving the development of rules, procedures, policies, guidelines, and/or instructions.*

Strongly disagree

Figure 6 - Position Vantage Point (Example)

- Facilitate collection of job descriptions, completed PVPs and desk audits from the Study Project Leaders or designated Human Resource department contact. The job descriptions, PVPs, and desk audit reports will be reviewed and analyzed in detail along with other documentation to obtain an understanding of the duties and responsibilities assigned to each position.
- Identify the classification of existing positions utilizing the existing job evaluation system, review jobs, and characterize the internal equity relationships within the City.
- Review all class specifications with the Study Project Leaders. Review each classification and score the classification using a Point Factor System or the system that the client has in place. Include an evaluation of desk audit results.

#### **Task D - Recommendations for the Classification Structure**

Develop preliminary recommendations for the classification structure. The classification system designed at this point will be based solely on internal equity relationships and will be guided by scores for each classification. Essentially, a structure of classifications will be reviewed and classifications with similar scoring would be grouped into pay grades. The final decision on the minimums and maximums of the pay grades will be determined after the market data has been collected.

#### **Task E - Classification Concept Analysis and Preliminary Allocation Development**

Prior to developing detailed class descriptions, our job evaluation will result in a classification plan concept and employee allocation document that will be submitted to the Project Team for review and approval. We recognize the client will have its own factors to determine hierarchy. We will compare changes in business needs and operations, as well as any reorganization, with the established classification system and job families, as well as review internal relationships between classifications.

Our job analysis method involves a systematic Position Evaluation approach. This whole position classification methodology examines your current evaluation criteria and augments it with other factors as needed.

Our analysis will include written documentation of our assessment methodology and assessment for each position surveyed. This document will list broad class concepts and highlight where significant changes may be recommended, such as, expanding or collapsing class series in the same functional area and/or separating or combining classifications assigned to different functional areas. We will review and analyze current classification series, the number of classifications and classification levels, and career ladders. We will also review and update established titling guidelines for the studied classifications for appropriate and consistent titling.

Essential Functions	Knowledge, Skills & Abilities
Certification / Licenses	Data Responsibility
Math	Judgment - Independent Decision Making
Impact of Decisions	Safety of Others
Equipment Usage	Mental Demands
Work Environment	Use of Technology

**Figure 7 - Position Evaluation Factors (Example)**

A detailed, incumbent-specific allocation list for each position included in the study will be prepared, specifying current and proposed classification title and the impact of our recommendations (reclassification upgrade or downgrade, title change, or no change). After we have completed this process, a meeting will be arranged to review any recommended changes to the classification plan with the Study Project Leaders.

Job Content Evaluation Profiles

Job Content Evaluation Profiles lists all of the job class titles and codes from the Primary Data File, the evaluated job levels and points for each of the compensable factors, and the total points for every job class.

**Task F - Job Class and Compliance Review/ Update**

Task F of the project will draft job class description and develop and update all documentation. This task includes the following activities. After preliminary approval of the class concepts and allocation lists, new and/or updated class descriptions will be developed for each proposed classification following the format approved by the client. We have a standard classification format but are flexible to use a format preferred by the client.

From the review of the PVPs, desk audit reports and any interviews, we will update duties, responsibilities, and minimum qualifications of each class specification, as necessary, or develop new class specifications if duties, responsibilities, and minimum qualifications have changed significantly. We will recommend new classification/class levels and/or operational changes, business needs, and any re-organizations that require new classifications.

Current Job Class	New Job Class	Trans Code
Superintendent of Printing	Printing Supervisor	T
Support Services Project Manager	Delete	D
Survey Party Chief	Survey Party Chief	N
Surveyor I	Surveyor	M,D
Surveyor II	Surveyor	S,N
	Utility Locator	J
Switchboard Operator	Clerical Assistant	M,D
Systems Analyst	Systems Analyst	N
Transaction Codes		
M - Merge into Other Class	S - Split into Two or More Classes	
T - Title Modification	N - No Change	
D - Delete Class Title	J - New Job Class	

**Figure 8 - Sample Index of Current to Recommended Classes**

Most Pay and Compensation practitioners and the relevant literature agree that three basic factors are important in determining compensation. These factors are: 1) skills required; 2) responsibility and accountability; and 3) working conditions. The Equal Employment Opportunity Commission recognizes only these three basic factors, along with seniority and performance, as valid determinants of compensation.

We will review, analyze, and update, as appropriate, knowledge, skills, abilities, education and experience, relevance and hierarchical consistency, position definitions, purpose, distinguishing characteristics, supervision received and exercised, position functions and special requirements including licensing and certification requirements.

Compliance Review - we will also review and update the physical demands based on the essential job functions of each classification in accordance with the Americans with Disabilities Act (ADA).

Incumbent	Current Job Class	New Job Class	Trans Code
Moss, R.	Accountant	Accountant	N
Warner, K.	Accountant	Programmer	R
Plummer, J.	Accountant	Accountant	N
Favre, B.	Senior Accountant	Senior Accountant	N
Ditka, M.	Senior Accountant	Senior Accountant	N
Ruud, E.	Accounting Clerk III	Accounting Clerk	T
Drukker, H.	Accounting Clerk III	Accounting Clerk	T
Transaction Code			
N - No Change	R - Reclassification	T - Title Modification	

**Figure 9 - Sample Allocation**

We will review each classification’s essential job functions and determine exempt vs. non-exempt status in accordance with all criteria under the Fair Labor Standards Act (FLSA) and do an overall review of compliance. We will develop an Index of Current to Recommend Job Classes (see Figure 8) and Position Allocation Register (see Figure 9).

Index of Current to Recommend Job Classes

The Index of Current to Recommended Job Classes is an alphabetical listing of all job classes currently used by the client and the recommended disposition of each of those job classes and titles. Current data is from the payroll, class specifications and/or job descriptions, classification plan and PVPs. New data includes job class title and transaction codes.

Position Allocation Register

Position Allocation Register strips the following per-position information for the Primary Data File: Current Job Class Title, Name of Incumbent, and Department.

The report then adds information from the Schematic of Occupational Job Classes.

### **Task G – Draft Job Class Description Buy-In and Informal Appeal Process**

Task G of the project will draft a job class description review and informal appeal process. This task includes the following activities:

- A draft copy of the revised/new class description with an allocation recommendation (see Figure 8 and Figure 9) will be submitted to the Project Leaders and subsequently to each manager, supervisor, and employee, to give each stakeholder group an opportunity to provide comments and concerns regarding any modifications to the classification structure and specifications.
- Our experience has been that this is one of the most critical phases of the project (but also one of the most time-consuming).
- Our proactive and effective communication process at this crossroad has always avoided formal appeals, adversarial meetings, or major conflicts at the conclusion of the study.
- Each employee whose position was studied will receive a memorandum from us outlining what has been accomplished, how to best review the draft classification specification (attached to the outline), and how to provide feedback to us.
- Supervisors and managers will receive a copy of their employees' draft class descriptions and will be asked to review their comments and feedback to verify and concur with the information provided.
- Each memo will have two options for the employee's signature: one line is reserved for employees who have read and agree with their draft class description; the other line is reserved for employees who have read the draft class description and disagree with certain parts, want to make changes, want to add or delete information, or have general questions about the description and/or the process.
- Employees shall submit their written concerns (via their supervisor/manager) to our office. While employees may not always agree with our recommendations, they have a "second chance" to ensure that they have been heard and to continue the educational process regarding why specific recommendations were made.
- Significant employee comments will be reviewed with management prior to making any significant changes to the proposed class plan. These discussions will be by email, telephone, or additional direct personal contact with employees, depending upon the extent and nature of the response.
- Allocation and/or class description changes will be made as required and the class specifications will be finalized and submitted for approval. All employees who submitted their comments during the review process will be notified in writing regarding the outcome of their concerns.

## Task H - Implement changes to Classification Plan and Draft Interim Report

A Draft Interim Report of the Classification Study will be completed and submitted to the client for review and comment. The report will contain:

- A recommended classification plan;
- A classification implementation and maintenance manual, including documentation regarding study goals and objectives, classification methodology, approach, and process, as well as, all findings, analysis, and resulting recommendations;
- The recommended allocation list, classification title changes, job family, and hybrid skills based career ladder;
- Career growth issues, reporting relationships, and other factors; and,
- Classification concepts and guidelines, as well as, distinguishing characteristics and other pertinent information for implementation and continued maintenance of the merit based pay plan will be in compliance with the State Pay Equity Compensation Standards.

Once we have received the City's comments regarding the Draft Interim Report and have made any necessary changes, a Final Classification Report will be developed that is compliant with State and Federal Regulations.

## Phase B Compensation Component

This Section of the study will result in the development of labor market survey parameters and the collection and evaluation of labor market survey data. Specific study tasks include (A) Identify Market Salary Benchmarks, Targets, and Benefits, (B) Data collection, (C) Analysis and Preliminary Data Review, (D) Draft Compensation Findings, Additional Analysis, and Study Project Leaders Meetings, (E) Internal Relationship Analysis and Internal Alignment, (F) Compensation Structure and Implementation Plan Development, (G) Preparation of Draft Summary Report, Final Reports, and Deliverables, and (H) Final Presentation.

### Task A - Identify Market Salary Benchmarks, Targets, and Benefits

Task A of the compensation study project will identify Market Salary Benchmarks, Targets, and Benefits. This task includes the following activities:

- Receiving approval before proceeding with the compensation survey.
- Involving the Study Project Leaders and stakeholders as appropriate, in the decision-making process.
- Agreement on which agencies are included *PRIOR* to beginning the study. Our experience has shown that this is the most advantageous approach.
- Conducting a thorough review of all materials to date including: employee database, classification listing, interviews, compensation review and meetings with Project Management Team. This will be closely followed by an exploration of the Project Team's overall strategic compensation vision.



- Thoroughly reviewing the various components of existing compensation plans and policies as well as the regulatory environment surrounding compensation.
- Identifying highly competitive positions within the organization and customizing recommendations.
- Reviewing and discussing how a compensation program might be designed to support the organization's business strategy and organizational objectives.
- Confirming and discussing the Project Team's preferred percentile placement within the market place.
- Acknowledging the organization's policy with respect to internal pay equity and employee perceptions of fairness.
- Addressing the Project Team's philosophy with respect to employee retention including the role compensation plays in retention issues as well as the Project Team's philosophy with respect to fiscal sensitivity and flexibility. This may include for example:
  - The degree to which the current philosophy has been communicated to employees, elected officials, and citizens, and,
  - The legal statutes and regulatory compliance mandates required of the employer and its' compensation programs.

#### **1. *Determination of Benchmark Classifications***

Paypoint HR will facilitate discussions with the Project Leaders, and any team members included by the Project Leaders, on position evaluation/job factor analysis systems that are designed to address internal job equity. The current systems used by the Organization will be helpful in this process. This component will unite the review of the current classification system's architecture with the legal requirements recognized by the Equal Employment Opportunity Commission (EEOC) as valid determinants of compensation. The essential piece of this position evaluation system review is Job Factor Analysis which measures job content and the elements that shape internal equity for each position.

In this regard, Paypoint HR will offer information and examples for the Project Leaders to consider and which will provide a measurable, rational, fact-based, methodology to determine the relative job worth within the organization (as required by the EEOC). "Benchmark classes" are normally chosen to reflect a broad spectrum of class levels. In addition, those that are selected normally include classes that are most likely to be found in other similar agencies, and therefore provide a sufficient and valid sample for analysis.

Internal relationships will be determined between the benchmarked and non-benchmarked classifications. Internal equity alignments will be made for salary recommendation purposes. Because we have found that the labor market typically yields reliable data, we recommend using about 60%-70% of all classifications as benchmarks, but we remain flexible to using a different model.

## **2. Practical exploration of market comparator agencies**

During this step Paypoint HR will facilitate discussions with the Study Project Leaders on external pay equity and the factors to consider in the development of market comparator agencies. Paypoint HR will discuss the element of comparator agencies at this point because of the critical impact the selection of comparator agencies will have on any subsequent market surveys the Project Team may choose to conduct.

Paypoint HR will conduct a thorough examination of the comparator agencies to ensure the worthiness and legitimacy of comparable units of government and private sector organizations and that the market comparison element does not jeopardize any subsequent project implementation of the Project Team's overall compensation philosophy. We will keep in mind the Project Team's criteria to include comparator employers by their degree of competition for obtaining and retaining high quality staff, their location in the organization's traditional recruitment areas and their level of complexity.

A comparison of 12-15 organizations typically provides a solid sample of similar employers to determine labor market trends and rates. It should be noted here that Paypoint HR recommends the organization use an empirically derived multivariate weighted model to develop comparator agencies using a set of criteria. These factors, along with others that may surface during discussions, will provide a solid, defensible list of comparable organizations such as those items listed in Figure 10.

Based on the philosophy developed by the discussions, Paypoint HR proposes to use the same criteria to undertake the modeling necessary to prepare a list of comparable organizations for the City. The model to be employed would utilize a set of public and private sector comparator agencies based on weighted variable and market factors including a preliminary list of organizations for the external labor market survey. This is achieved by placing a comparative emphasis on additional characteristics such as:

- **Organizational type and structure** - During this iterative process, Paypoint HR will discuss the Project Team's list of comparators and the advantages or disadvantages of the comparators inclusion.
- **Similarity of population served, the Organization's demographics, the staff, and operational and capital improvement budgets** - These elements will be used to provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
- **Scope of services provided** - While having an organization that provides all of the services at the same level of citizen expectation is ideal for comparators, as long as the majority of services are provided in a similar manner, sufficient data should be available for analysis.
- **Labor market** - The reality of today's labor market is that many agencies are in competition for the same pool of qualified employees. No longer do individuals

necessarily live in the community they serve. Therefore, the geographic labor market area (where the Organization may be recruiting from or losing employees to) will be taken into consideration when selecting potential comparator organizations.

- **Cost of living** - The price of housing and other cost-of-living related issues are some of the biggest factors in determining labor markets. We will review the overall cost of living of various geographic areas, median house prices, and median household incomes to determine the appropriateness of various potential comparator agencies.

**Sources of External Data**

Criterion	Source	Weighting
1. Municipal Department (Sheriff's Department)	Maryland State Sheriff's List	Yes/No
2. Square Mileage	U.S. Census 2015, Quick Facts <a href="http://www.census.gov/geo/www/tiger/index.html">http://www.census.gov/geo/www/tiger/index.html</a>	5%/5 pts.
3. Population	U.S. Census, <a href="https://www.census.gov/topics/population.html?cssp=SERP">https://www.census.gov/topics/population.html?cssp=SERP</a>	15%/15pts
4. Median Household Income	U.S. Census, <a href="http://quickfacts.census.gov/qfd/meta/long_INC110212.htm?cssp=SERP">http://quickfacts.census.gov/qfd/meta/long_INC110212.htm?cssp=SERP</a>	10%/10 pts.
5. Proximity in Miles	<a href="http://www.zip-codes.com">www.zip-codes.com</a>	10%/10 pts.
6. Equalized Property Value (EPV)	Maryland State Comptroller, <a href="http://www.dat.maryland.gov/sdatweb/taxrate.html">http://www.dat.maryland.gov/sdatweb/taxrate.html</a>	10%/10 pts.
7. Number of Full-Time Equivalent Employees	St. Mary's County FY 2016 Budget, Maryland State Comptroller	15%/15pts
8. Total Expenditures	St. Mary's County FY Budget 2016	15%/15pts
9. State/Local Sales Tax Revenue	St. Mary's County FY 2016 Budget, Maryland State Comptroller	10%/10 pts.
10. General Fund Total Revenue	St. Mary's County FY 2016 Budget, Maryland State Comptroller	10%/10 pts.

*\*\*\*The model applies the point system above in the proportional measures as compared to the target City or County, or in this instance, St. Mary's County. Note: the information above is conceptual only. Final variables would be developed in collaboration with the Study Project Leaders.*

**Figure 10 - Sample Concept of Model Variable and Weighting Rubric**

Paypoint HR maintains a library of survey data and will provide access to our information as well as any additional custom survey data we compile for the Project Team specifically in the form of summary reports. Additionally, through our memberships with WorldatWork and

SHRM, we have industry data readily available. Information we have access to include the most recent survey reports conducted by the associations, updates to regulations on a federal and state level, as well as latest trends and best practices. We anticipate using four to five surveys but are flexible to include more if the Project Team has specific survey sources it would like us to use – survey library includes the option for public and private sector comparable agencies.

The Sources of External Data section identifies the source of each rate that comprises the external prevailing rate for the organization's salary survey's benchmark job classes. This data may be updated annually to compute the new prevailing rate for each benchmark job class. If the external data was obtained through a special salary survey questionnaire, this table will indicate for each benchmark job class: the name of the employer (if approved for release by the employer during the survey data collection), their job class title, and the current salary data. If the external data source was extracted from an existing salary survey, this table will indicate the same information as in the previous paragraph. If the report provides only merged data for each matched organization benchmark, this table will only indicate the name of the survey, the survey benchmark job title, and the salary data. In the event we utilize the information provided by the Project Team for benchmarking, this information will be identified.

### ***3. Determination of Salary and Benefits Data to be Collected***

Paypoint HR understands that the organization intends to conduct a market study on salary data using both public and private sector organizations. Shown below are descriptions of those benefits that we can collect, but which can be modified to include any other information the Project Team desires:

- **Monthly Salary** - The top of the normal published salary range. All figures are presented on a monthly basis. We normalize the salary data to reflect working hours and/or "spiking" of retirement or other benefits. Cost of Living adjustments will be considered as requested by the Project Team.
- **Employee Retirement** - This includes two figures: the amount of the employee's State or other public or private retirement contribution that is contributed by the organization and the amount of the organization's Social Security contribution.
- **With healthcare costs rising and retiree healthcare and liabilities increasing for many public agencies, we typically collect retiree health information as well. However, we do not roll this cost into our total compensation analysis, but report it separately, describing what the liabilities are.**
- **Insurance** - This typically includes Health, Dental, Vision, Life, Long-Term Disability, Short-Term Disability, Employee Assistance Program (EAP), and other insurance coverage.

- Leave – Other than sick leave, which is usage-based, leave is the amount of days off for which the organization is obligated. All days off will be translated into direct salary costs.
- Vacation - The number of vacation days available to all employees after five (5) years of employment.
- Holidays - The number of holidays (including floating) available to the employee on an annual basis.
- Administrative/Personal Leave - Administrative leave is normally the number of days available to management staff to compensate for the lack of payment for overtime. Personal leave may be available to other groups of employees as a means to augment vacation or other time off.
- Deferred Compensation – This is any deferred compensation provided to all members of a classification, either as an employer-matching contribution or as a straight dollar or percentage contribution.
- Merit Increase/Performance Incentive Systems – This includes any performance incentive systems or programs the organization may have that rewards above-average performance.
- Other - This category includes any other benefits that are available to all employees within a classification and not already specifically detailed.

### **Task B - Data Collection**

Determining a comparable classification will include, at a minimum, comparison of the experience and education qualifications required, number of people supervised, level within the organization and degree of authority, and scope and complexity of the work performed. Once the data is collected it will be thoroughly analyzed utilizing a spreadsheet. It is anticipated that this analysis would include a detailed presentation of base salary information for each survey class including the name of the comparable class, the top step salary, the mean and/or median labor market top salary, and a comparison between the survey's mean and the organization's maximum salary for each survey classification.

We conduct all of the data collection and analysis ourselves to ensure validity of the data and quality control. This approach also ensures that we compare job description to job description and not just job titles, therefore ensuring true "matches" of at least 70%, which is the percentage we use to determine whether to include a comparator classification or not. As mentioned above in Phase A, Task E, our job analysis method encompasses the Whole Position Evaluation approach. Our analysis will include written documentation of our assessment methodology and assessment for each position surveyed.

We typically collect classification descriptions, organization charts, salary schedules, personnel policies, MOUs, and other information via websites and telephone or on-site interviews. Combining the knowledge gleaned from the data gathered from each comparator agency with our experience in the public sector human resources field, our professional staff will make preliminary "matches" and then schedule appointments by telephone, and sometimes in person, with knowledgeable individuals to answer specific questions. Paypoint HR has found in the past that the information collected using these methods has a very high validity rate and is generally substantiated by employees, management, and governing bodies.

### **Task C – Analysis and Preliminary Data Review**

Following the preliminary analysis of the survey data, Paypoint HR will conduct an in-depth review of the survey results with the Study Project Leaders, as appropriate. The purpose of this review is to identify any additional information needed or areas that require further analysis. The data will be entered into a spreadsheet format designed for ease of interpretation and use.

The information will be presented in a format that will identify the comparator positions used for each classification comparison. The information will be calculated based upon both average and median values allowing the Project Team to make informed compensation decisions.

Other elements of the compensation survey report are:

- Agencies surveyed;
- Comparable class titles;
- Salary range maximum/control point;
- Number of observations; and,
- Percent of the organization's salary range above/below the market average/median values.

In addition, we will include any type of statistical representation and analysis that the Project Team desires, such as 60<sup>th</sup> or 70<sup>th</sup> percentile, analysis of variance (ANOVA), etc. Benefits data will be displayed in an easy-to-read format. The Project Team will receive three sets of spreadsheets per classification: one with base pay, one with detailed benefits, and one with total compensation statistical data. We are often asked to collect "other" benefits (as listed in the benefits section above), which we can additionally report in a separate spreadsheet.

### **Task D – Draft of Study Findings/Additional Analysis/Study Project Leaders Meetings**

In Task D, we will distribute our draft findings to the Project Team. After the Project Team's preliminary review, Paypoint HR will meet with the Study Project Leaders and other stakeholders (including management, employees, Executive Staff and Human Resources) to clarify data, receive requests for reanalysis of certain comparators, answer questions, and address concerns. This provides an opportunity for the Study Project Leaders and other stakeholders to review and provide input concerning any of our recommended benchmark comparator matches.

Depending on the Project Team's preference, this process can be structured similar to the informal appeals process described in the classification portion of the study. We will disseminate the compensation information with an explanation in memo format and then receive written comments from employees (via their supervisor/manager). If questions arise, we will conduct a follow-up analysis to confirm our original analysis and make adjustments as appropriate. Paypoint HR will establish criteria for position evaluation. Paypoint HR will compare custom survey findings with other relevant survey data. We maintain a proprietary database of survey data and have access to Salary Budget Surveys, Survey Results, Survey Searches, Upcoming Surveys, and a library of other relevant resources.

We prefer to compare the organization's custom survey to at least four (4) other surveys with criteria that matches the identified benchmark data. In the event the Project Team prefers not to conduct their own custom study, Paypoint HR will use at least five (5) and no more than ten (10) survey data sources for analysis. We use multiple survey sources of existing data to incorporate trends and anomalies and ensure confidence in the final outcomes. Market studies used for comparison will need to meet rigorous standards in order to be considered, for example, 70% or greater match of job duties for benchmark jobs. Surveys will be weighted based on relevance. Market data will be aged if necessary.

#### **Task E - Internal Relationship Analysis, Internal Alignment and External Prevailing Rates Comparison**

To determine internal equity for all studied positions, considerable attention will be given to this phase of the project. It is necessary to develop an internal position hierarchy based on the organizational value of each classification. Again, we utilize the "whole position" analysis methodology as described above in Phase A, Task E. By reviewing those factors, we will make recommendations regarding vertical salary differentials between classes in a class series (if recommended), as well as across departments. This analysis will be integrated with the results of the compensation survey.

The ultimate goal of this critical step of the process is to address any potential internal equity issues and concerns with the current compensation system, including compaction issues between certain classifications. We will create a sound and logical compensation structure for the various levels within each class series, so that career ladders are not only reflected in the classification system but also in the compensation system with pay differentials between levels that allow employees to progress on a clear path of career growth and development. Career ladders will be looked at both vertically and horizontally to mirror the classification structure that was developed during the classification section of the study.

We will also develop recommendations for the continued administration of the recommended Pay and Compensation structure by the organization's staff. Specific guidelines for future adjustments will be included in the study final report and implementation manual. Key areas addressed will be; recommendations concerning new hires, ongoing pay adjustments, ongoing pay scale maintenance, future market adjustments, demotions, and promotions.

**Activities**

Based on the External Prevailing Rates Comparison, we will develop recommendations and guidelines for the continued administration and maintenance of the Pay and Compensation structure including those related to:

- How employees can move through the pay structure/system as a result of new hire, transfers, promotions, or demotions;
- How to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- How to adjust for existing compression and avoid further compression;
- the proper mix of pay;
- How often to adjust pay scales and survey the market;
- the timing of implementation; and,
- How to keep the system fair and competitive over time.

Benchmark Job Class	Current Midpoint	Aged Survey Midpoint	Variance \$	Variance %
Public Works Director	\$49,686	\$77,269	-\$27,583	-35.7%
Police Chief	\$49,686	\$77,102	-\$27,416	-35.6%
Human Resource Director/City Clerk	\$37,080	\$57,062	-\$19,982	-35.0%
Police Lieutenant	\$35,310	\$42,344	-\$7,034	-16.6%
Building Inspector	\$32,028	\$33,438	-\$1,410	-4.2%
Human Resource Specialist	\$23,898	\$24,961	-\$1,063	-4.3%
Laborer	\$21,678	\$20,721	\$957	4.6%
Comptroller	\$37,080	\$32,465	\$4,615	14.2%

**Figure 11 - External Comparison (Example)**

We will create and present implementation solutions that will take into account both the current position of the organization as well as the findings from the Pay and Compensation analysis. We will identify and prepare a range of compensation policy alternatives. We will recommend recruitment and retention strategies, where appropriate. Finally, we will present our recommendations to the Study Project Leaders for review.

External Prevailing Rates Comparison

The External Prevailing Rates Comparison (see Figure 11) looks at the client's current salary structure midpoint for each of its salary survey benchmark job classes from the Primary Data File relative to the external prevailing rate, indicating both the dollar and percentage variance of the client's rates to the prevailing rate.



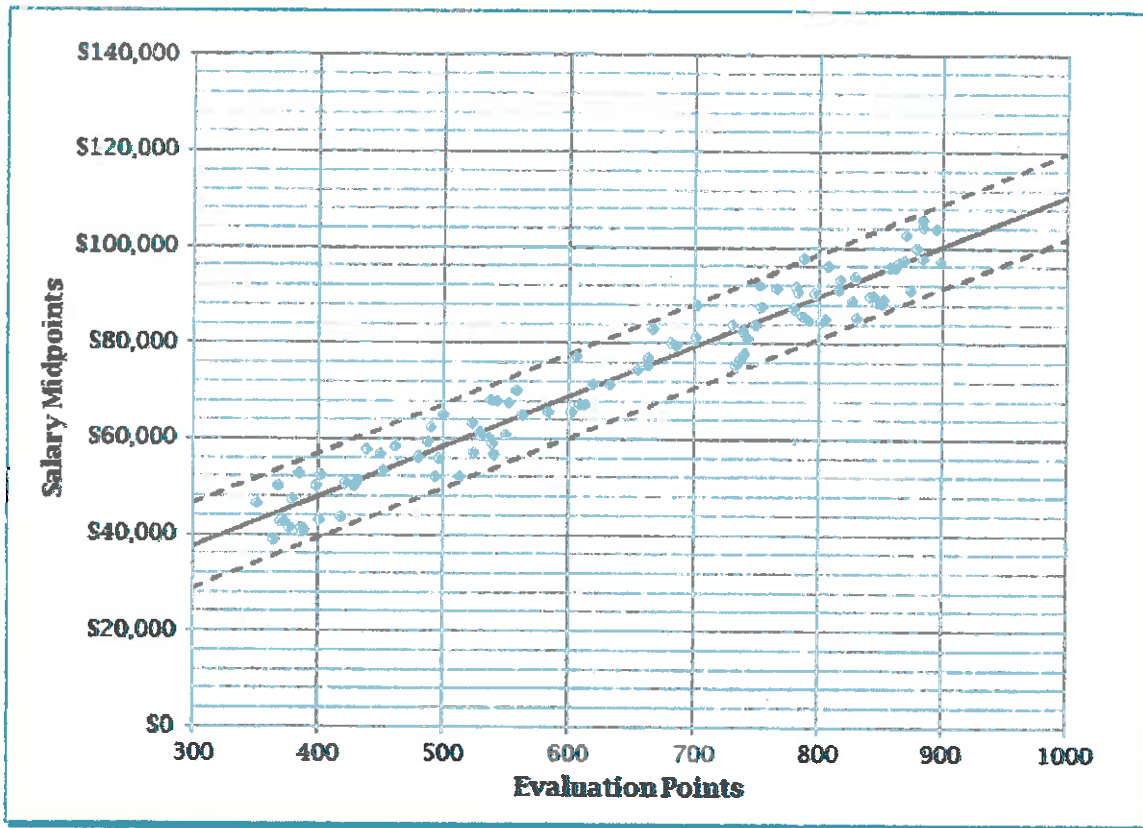


Figure 12 - Sample Scattergram

Internal Equity Analyses Scattergram

The Internal Equity Analysis Scattergram (see Figure 12) consists of 1) a scatter diagram for each primary group of job classes (e.g., Clerical/Office, Labor/Trades, Professional/Technical, or Management/Executive), 2) a cone dispersion analysis, and 3) a current salary practice line of central tendency (LCT) and associated formulae. This is achieved by utilizing the Salary Range Midpoints from the Primary Data File.

External Prevailing Rates LCT

The External Prevailing Rate LCT depicts one or more LCTs representing external prevailing rates. These are constructed by combining the client's job content points from the Job Content Evaluation with the external prevailing rate from the External Prevailing Rates Comparison.

LCTs Comparison Chart

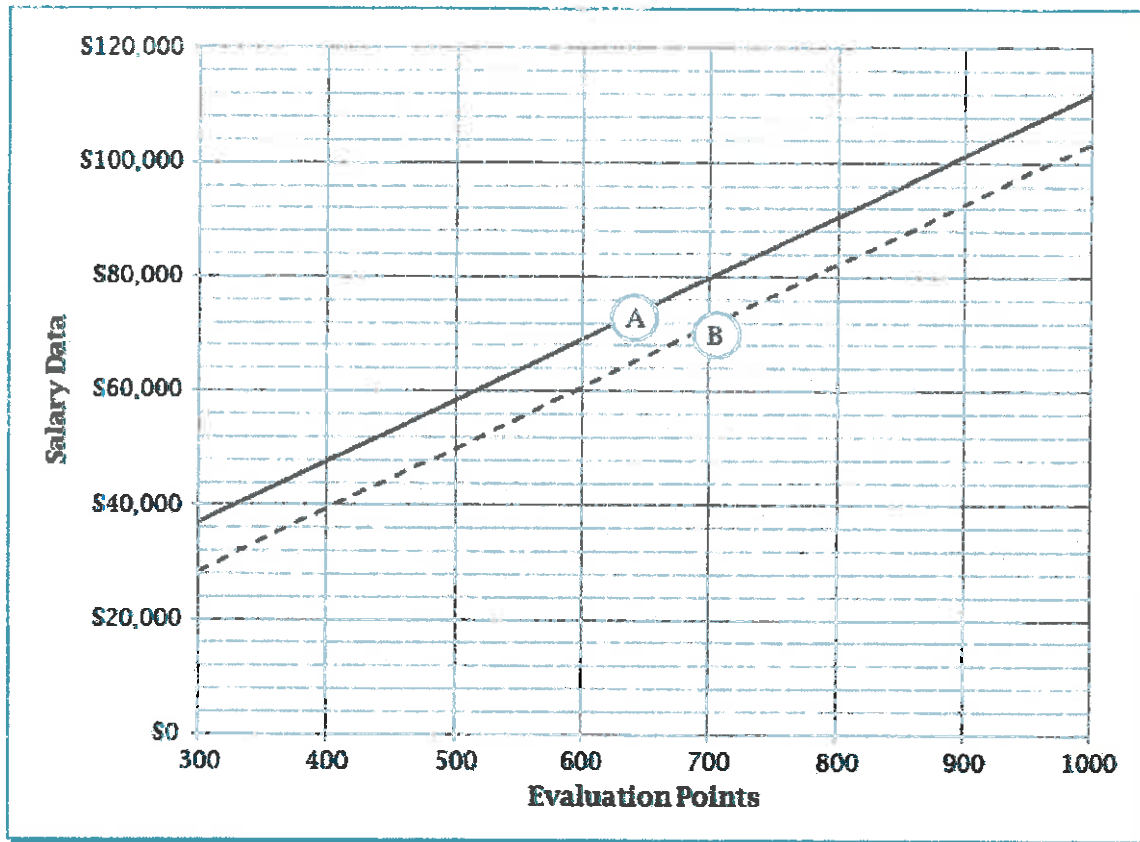


Figure 13 - Sample Comparison Chart

The LCTS Comparison Chart consists of a graphical comparison of the lines of central tendency and formulae of the client's current salary practice for its primary job groups to those of the external prevailing rates. The prevailing rate LCTs and formulae are constructed and computed by combining the client's job content points from the Job Content Evaluation with the external prevailing rate amounts from External Prevailing Rates Comparison.

Class Code	Occupational Job Families and Job Classes	Lvl	Min	Mid	Max
1400	Public Works Series Facilities Maintenance and Craft Group				
1431	- Maintenance Supervisor *	59	\$54,441	\$68,052	\$81,662
1432	- Parks Supervisor *	59	\$54,441		
1433	- Senior Skilled Craft Specialist	35	\$30,099		
1434	- Skilled Craft Specialist	29	\$25,954		
1435	- Maintenance Technician *	30	\$26,603		
1436	- Maintenance Technician Assistant	26	\$24,101		
1437	- Parks Maintenance Specialist	25	\$23,513		

Figure 14 - Job Class Salary Range (Example)

Class Code	Occupational Job Classes	Lvl	Min	Mid	Max
1714	Director of Planning, Zoning and Building	65	\$60,610	\$75,763	\$90,915
1133	Internal Auditor *	65	\$60,610	\$75,763	\$90,915
1112	Assistant City Administrator	64	\$59,131	\$73,914	\$88,697
1620	Director of Recreation *	63	\$57,689	\$72,112	\$86,534
1279	Fire Chief *	63	\$57,689	\$72,112	\$86,534
		62	\$56,282	\$70,353	\$84,423
1243	Assistant Chief of Police *	61	\$54,909	\$68,637	\$82,364

\* - Salary Survey Benchmark

Figure 15 - Sample Quantitative Job Class Salary Range

Per Job Class Salary Range Assignment (Class Order)

Per Job Class Salary Range Assignment (Class Order) assigns each job class to a salary range within the Permanent Salary Range Schedule (see Figure 14). The process is different for salary plans based on direct market pricing than for those based on quantitatively evaluated job content.

Plans based on direct market pricing are constructed by assigning each benchmark job class to the salary range whose Midpoint most closely matches the external prevailing rate from the External Prevailing Rate Comparison. Non-benchmark job classes are assigned to their salary ranges by reference to Non-Benchmark Linkage. Flexibility for subsequent internal equity adjustments to the Per Job Class Salary Range Assignment is provided on the basis of professional judgment.

Per Job Class Salary Range Assignment

Plans based on quantitative job evaluation are constructed by multiplying the job points for each job class from the Job Content Evaluations by the client's salary competitiveness policy formula for each primary job group from the Line of Central Tendency. The process then looks up the Permanent Salary Range Table for the midpoint amount on the Permanent Salary Schedule closest to the product of the calculation, which then designates the proper salary range (see Figure 15).

Non-Benchmark Linkage Table

A Non-Benchmark Linkage Table for non-quantitative plans correlates the class titles of the job classes which are not salary survey benchmarks to the class title of the benchmark or reference job classes to which they are linked. The process automatically adjusts the salary range for the non-benchmark class by the current salary range differential when the salary of its linked benchmark or reference job class is adjusted in the Per Job Class Salary Range Assignment.

Non-Benchmark Job Title	Benchmark Job Title
Accounting Manager	Accountant
Adult & Info Services Manager	Librarian
Building Monitor	Office Assistant
Building Maintenance Supervisor	Building Maintenance Worker
Building Permit Specialist	Executive Secretary
Bus Driver	Light Equipment Operator
Business Manager	Accountant

Figure 16 - Linkages (Example)

This table is to be utilized as a guide during annual salary plan updates, permitting non-benchmark job classes to be adjusted by the same number of salary ranges as the salary survey benchmark job class to which they have been linked.

**Task F - Compensation Structure and Implementation Plan Development**

Depending on the data developed as a result of the internal analysis, we will review and make recommendations regarding internal alignment of your salary structures including General Pay Schedules, Exceptional Schedules and Part-Time/Temporary Non-Classified Schedules/Lists. We will develop recommendations for pay grades and salary ranges for all classifications based on median and/or mean salaries from the comparable agencies based on the organization’s overall compensation philosophy and policy.

- We will conduct a competitive pay analysis using the market data gathered to assist in the determination of external pay equity and the recommendation of a new base compensation level for each classification studied.
- We will conduct a comparative analysis to illustrate the relationships between current pay practices and the newly determined market conditions, and develop solutions to address pay equity issues, analyze the financial impact of addressing pay equity issues, and create a market adjustment implementation strategy supporting your goals, objectives, and budget considerations.

Per-Position Compa-Ratio Table

The Compa-Ratio (short for Comparative Ratio) is a calculation which expresses the percentage relationship of the incumbent’s current base salary amount to the Midpoint of the salary range for their position’s job class.

	New Job Class	Current Salary	Lvl	Min	Mid	Max
Simon, N.	Administrative Assistant	\$21,330	26	\$24,101	\$30,127	\$36,152
Taylor, J.	Director of Real Property	\$85,685	67	\$66,331	\$82,914	\$99,497
Garcia, J.	Chief Deputy of Operations	\$56,815	46	\$39,493	\$49,366	\$59,239
Crow, S.	Program Manager	\$51,385	44	\$37,590	\$46,988	\$56,385
Iorni, A.	Medical Investigator	\$69,716	70	\$71,432	\$89,290	\$107,147
Reidle, J.	Forensic Technical Specialist	\$77,123	55	\$49,321	\$61,652	\$73,982
Young, N.	Principal Secretary	\$24,354	26	\$24,101	\$30,127	\$36,152

	Current Salary	Compa-Ratio	\$ < Min	\$ < Mid	\$ > Max
Simon, N.	\$21,330	70.8%	\$2,771	\$8,797	-
Taylor, J.	\$85,685	103.3%	-	-	-
Garcia, J.	\$56,815	115.1%	-	-	-
Crow, S.	\$51,385	109.4%	-	-	-
Iomi, A.	\$69,716	78.1%	\$1,716	\$19,574	-
Reidle, J.	\$77,123	125.1%	-	-	\$3,141
Young, N.	\$24,354	80.8%	-	\$5,773	-

Figure 17 - Sample Compa-Ratio

Per-Position Compa-Ratio Table (see Figure 17) provides the following information, which is added to the Primary Data File, from the Position Allocation Register, the Permanent Salary Range Schedule and the Per Job Class Salary Range Assignment.

Job Class Title	Incumbent's Name	Incumbent's Current \$
Job Class Code	Salary Range Number	Amount Below Minimum
Department	Salary Range Midpoint	Amount Below Midpoint
Compa-Ratio	Salary Range Min/Max	Amount Above Maximum

Using this information, we will assign all positions to appropriate pay grades and review recommendations with the Project Leaders.

Fiscal Impact Estimate Table

Number of Employees	287
Total Payroll	\$10,684,333
Number of Employees Below Minimum	77
As % of total employees	26.83%
Total \$ below Minimum	\$121,099
As % of total payroll	1.13%
Average amount below Minimum	\$1,573

Figure 18 - Cost Analysis (Example)

The Fiscal Impact Estimate Table (see Figure 18) provides, on a department or cost center basis, the estimated annualized cost to bring the salaries of all employees to the Minimum of the salary range for their position's job class. The information combines the department designation from the Primary Data File with the total amounts of current salaries and salaries below the Minimum from the Per-Person Compa-Ratio.

- It is critical for the successful adoption of the recommendations given by Paypoint HR to have a Pay and Compensation plan design that considers the organization's ability to administer and maintain the plan. We will look at infrastructure such as payroll processes/capabilities and staffing levels of the Human Resources Department to ensure compatibility, convenience and ease of use.
- Paypoint HR plans to work side by side with the Human Resources staff and Project Leaders throughout the process of Pay and Compensation design. We expect to develop an overall solution that not only strategically positions the organization to be able to recruit and retain excellent employees, but will be transferable, sustainable and scalable.
- We expect to conduct a work session with the Human Resources Department and Department Heads as appropriate, to review possible implementation obstacles. Fortunately, our process includes interviews with the management team and allows for an informal process for appeals. This will help alleviate some of the problem areas prior to development of the final plan.
- We will work with the organization's staff to develop effective responses to any questions. We will conduct "train the trainer" sessions with Department Heads to educate them on the plan, its impact, and "steps to take" to explain it effectively to their teams. We anticipate conducting training sessions with the Human Resource Department Heads in order to implement effective administration and maintenance of the approved final plan.
- We will provide: a set of all market data spreadsheets; proposed salary ranges; plan documents; any alternative compensation plans identified; a policy and procedure document to address employees whose base pay exceeds the maximum of their newly assigned pay range; a manual of instructions and training materials regarding the administration of the proposed compensation system; a list of implementation issues and cost projections surrounding our recommendations; and, a guide for rules, policies, and procedures for implementing, managing, and maintaining the compensation system.

Paypoint HR will prepare a cost analysis for positions that fall below the proposed minimum salaries following reclassification using Compa-Ratios, proprietary software, and industry best practices. We will develop a practical procedural document with steps to address corrections for any positions that fall below the minimums and train the Human Resources staff on how to administer the recommendations for those affected.

Finally, we will evaluate benefit offerings in the labor market and make recommendations for form, content, validity, and FLSA, EEOC, and ADA and ACA compliance to better align and/or differentiate benefit offerings by:

- Conducting analysis and determining best practices,
- Recommending a systematic, regular process for reviewing job descriptions, and,
- Conducting a compliance review to make all necessary state and federal compliance determinations based on work performed.

The goal is to develop a dynamic compensation tool/model that will give you the most flexibility in compensating your workforce competitively and fairly.

#### **Task G – Preparation of Draft Summary Reports, Final Reports and Deliverables**

The Draft Final Report will be completed and submitted to the Study Project Leaders for review and comment. The report will provide detailed compensation findings, documentation, and recommendations. The report will include the following information:

- A set of all market data spreadsheets;
- A proposed Salary Range/Plan document;
- Any alternative compensation plans identified;
- A policy and procedure document to address employees whose base pay exceeds the maximum of their newly assigned pay range;
- A manual of instructions and training materials regarding the administration of the proposed compensation system;
- A list of implementation issues, schedules, fiscal impact statements, cost projections and communications surrounding our recommendations;
- A guide for rules, policies, and procedures for you in implementing, managing, and maintaining the compensation system;
- The option to implement the recommended plan in phases;
- Train the trainer sessions; and,
- Proprietary cloud-based software and support plan options including product upgrades, and progression through versions.

After an initial round of feedback from the Study Project Leaders, we will make edits and resubmit for review and approval. We will conduct final meetings with the Project Team and stakeholders and make final adjustments on the recommendations from the Draft Summary prior to delivery of the final report to appropriate stakeholders. Once all of your questions and concerns are addressed, a Final Report will be created and submitted in bound format.

#### **Task H – Final Presentation**

Paypoint HR typically works on tight schedules that demand extensive written communication. We feel this is one of our strongest attributes and welcome the opportunity to work with the client to prove ourselves as excellent communicators in all types of media. We have staff that have acted as lead negotiators with Teachers Unions and are able to



communicate complex information clearly and concisely. We are comfortable speaking with individuals one to one, in focus groups, at departmental meetings, and at conferences. An area of communication where we particularly excel is in the ability to communicate with employees at all levels of education and background. We are able to adapt our style of communication to meet the needs of the situation and have been well received by our audiences. We have developed valued relationships and are considered by our previous clients and their employees as a trusted advisor. This has been helpful to our clients in that we are seen as a liaison and have discovered opportunities and issues that would not have otherwise been utilized or addressed.

## Conveying Changes

Communication with the Project Team and key stakeholders are described at each step in the process of our project methodology. We consider our audience, the Project Team, Managers, and employees. We have tailored our process to involve each at the appropriate times. We incorporate meetings, frequently asked questions, questionnaires, informal appeals, reviews and feedback sessions. Media used during the project to convey changes include; online access to information, written communication, forms, face-to-face meetings, electronic communication as well as virtual meetings.

Following the completion of the above review, Paypoint HR will prepare the final report. The Final Report will incorporate appropriate revisions identified and submitted during the review of the draft report. We anticipate at least one presentation to the major stakeholders. This final report will fully document all survey activities and recommendations including:

- Overview of study methodology
- Discussion of the labor market survey parameters.
- Presentation and analysis of the major survey findings.
- Presentation and discussion of the major salary structure recommendations.
- Options for salary recommendation implementation.
- Steps for accomplishing goals including the option to implement the recommendations in phases.
- Scheduling and fiscal impact review.
- Post implementation support including exit meeting(s) with the Project Leaders.

Weekly progress reports will be provided to the Project Team. Paypoint HR will also provide to the Project Team interim reports as the project progresses. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise.

## Maintenance

To conduct a pro-active ongoing maintenance program for the client's compensation structure, we recommend an in-depth review of the pay plan every three years to consider internal and external equity among key benchmarked positions. During interim years, where there are issues of concern, brief reviews and updates should be conducted. In the event, there is a

grievance filed by an employee, Paypoint HR will be available as needed to support the client in the formal appeal process. By developing an ongoing maintenance plan, the client should expect to see the benefits and return on investment through reduced turnover, and fewer employee complaints.

### 6. Proposed Time Schedules for Completion of Project

Our professional experience is that comprehensive studies of this scope and for this size organization take no more than 16 weeks to complete, allowing for adequate position vantage point completion, interview time, classification description development, compensation data collection and analysis, review steps by the client, the development of final reports, and any appeals.

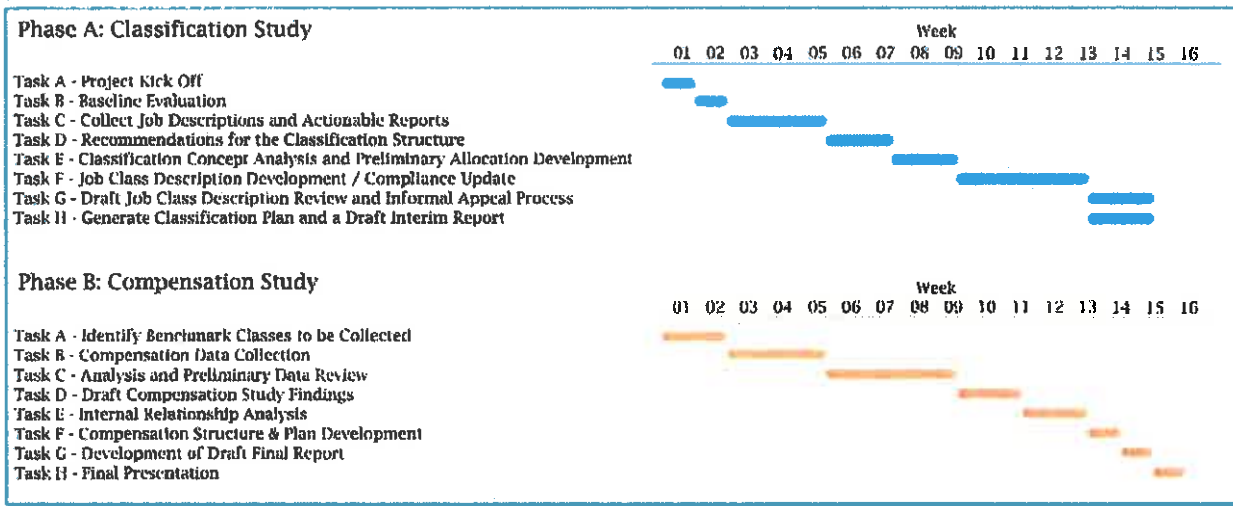


Figure 19 - Gantt Chart

Weekly progress reports will be provided to the client. Paypoint HR will also provide to the Project Team interim reports as the project progresses. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise. A customized schedule would be constructed in conjunction with both Paypoint HR and the City to meet the project requirements.

## **Deliverables**

- On-site Kick-off meeting with Project Team and collaborative development of the project communication plan.
- Project planning and methodology.
- Creation of 2 custom websites. One website will be used for completion of the job analysis by employees and the second is intended for the supervisor review of employee job analysis responses.
- On-site Briefing Sessions with All Employees to go over the scope of the project, their role, and to give direction on how to complete the job analysis.
- Job evaluations completed using scores from job analysis responses.
- Comparator Analysis to identify localities that compete for labor with the City.
- Development of agreed benchmark positions.
- External Market Survey of comparators for benchmark job titles.
- On-site Focus Groups.
- Update of Job Descriptions to include FLSA and ADA compliance.
- Creation of recommendations for reclassifications including job title simplification.
- Development of a Compensable Factor Scoring System for use and maintenance of job evaluations and internal equity.
- Development of training and implementation materials and manual.
- Development of a salary structure based on the survey findings and job evaluations.
- Survey finding reports showing options for strategic position as compared to current position.
- Fiscal impact of development of a strategic market position.
- Cumulative final report for presentation.

## **7. A Written Disclosure of Conflicts of Interest**

Paypoint HR does not have any conflicts of interest.

## 8. Professional Fee Proposal Including Fee Schedule for Additional Services



<b>PHASE A Classification Study</b>		
Task		Hours
A	Project Kick Off	12
B	Baseline Evaluations	14
C	Collect and Acknowledge Job Descriptions and Actionable reports	16
D	Recommendations for the Classification Structure	22
E	Classification Concept/Preliminary Allocation Development	16
F	Job Class Description Development/Compliance Review/Update	22
G	Draft Class Description Review/Informal Appeal Process	18
H	Finalize Compliant Classification Plan/Draft Interim Report	10
<b>Subtotal Professional Hours</b>		<b>130</b>
<b>PHASE B Compensation Study</b>		
Task		Hours
A	Identify Benchmark Classifications, Targets and Benefits to be Collected	12
B	Compensation Data Collection	14
C	Analysis and Preliminary Data Review	16
D	Draft Compensation Findings/Additional Analysis/ "Working Group" Meeting	22
E	Internal Relationship Analysis/Internal Alignment	16
F	Compensation Structure/Implementation Plan/Compliance Review	22
G	Development of Summaries, Final Report and Deliverables	18
H	Final Presentations and Post Implementation Support	10
<b>Subtotal Professional Hours</b>		<b>130</b>
<b>Total Estimated Hours of Phase A &amp; Phase B</b>		<b>260</b>

The standard consulting rate for the senior personnel listed, consistent with the Federal GSA schedule, is \$125 per hour of service. For a project entailing 260 hours of service, the total fee would be \$32,500. Our fee includes expenses associated with travel, phone, materials, and supplies. The total is an estimate of the time needed. Biweekly invoices, including a thorough delineation of services rendered, would be on a net 30-day basis. Paypoint expects support from the Client in communication with key staff, setting up meetings, providing meeting resources as well as establishing reporting relationships, milestones and timelines.

### Additional Service

Paypoint HR's 360° Performer Employee/Peer/Manager (EPM) System provides an analytical tool to measure the performance of employees by seeking the input of not only the individual employee and their respective manager, but also their peers within the organization. Paypoint's 360°-Performer System involves asking a series of performance related questions to each employee/manager while also allowing each employee/manager to answer the same questions about the performance of their peers/employees and their managers. The system categorizes the responses based on the respondent and delivers objective metrics to quantify performance. It is typically recommended that the employees who receive top scores receive an equal share of both a monetary and non-monetary form of compensation for their performance. Non-monetary forms of compensation can be anything from a parking spot to official public recognition to a department pizza party in their honor. For the employees who score low both relative to the responses of their peers and managers, it is recommended that remedial action be considered. A sample of questions that are typically asked follows, but can be customized for the client. Narrative questions can also be included for employee feedback purposes.

## 360 Performer

### Character

**Question #1**  
*This person is open to positive feedback and constructive criticism.*

- Strongly agree
- Somewhat agree
- No opinion
- Somewhat disagree
- Strongly disagree

**Question #2**  
*This person is sensitive to satisfaction and morale in the organization.*

- Strongly agree
- Somewhat agree
- No opinion
- Somewhat disagree
- Strongly disagree

**Question #3**  
*This person creates an atmosphere that inspires others to achieve at a higher level.*

- Strongly agree
- Somewhat agree
- No opinion
- Somewhat disagree
- Strongly disagree

Use of Paypoint HR's 360 Employee/Peer/Manager (EPM) System would be provided at no cost for the first review. Subsequent reviews would be priced to reflect the needs of the client. Typically, Paypoint charges a setup fee of \$1,000 (waived) and \$50 per participant with a minimum purchase of \$2,500 worth of services.

## 9. Payment Schedule for Professional Fees

Paypoint HR anticipates an initial fee of \$500 billed at the time of agreement followed by bi-weekly invoices with net 30 payment. Each invoice typically delineates the services offered for the period specified and hours billed for those services. We are willing to work with our clients to coordinate a payment schedule that meets their individual needs.

## 10. Proposed Contract Form

This AGREEMENT FOR SERVICES (the "Agreement") is made and entered into as of xxxxx, 2018, the ("Effective Date") by and between University City, Missouri ("Client") with a principal office and place of business at 6801 Delmar Blvd., University City, Missouri 63130 and Paypoint HR, LLC, 695 Santa Maria Lane, Davidsonville, MD 21035 ("Contractor"). Client and the Contractor shall be collectively referred to herein as the "Parties".

Whereas, Client desires to retain Contractor to provide certain services described more fully herein, and Contractor desires to provide Client said services, all in accordance with the terms of this Agreement;

Now Therefore, Client and Contractor agree as follows:

1. **Scope of Services:** Contractor shall carry out all services reasonably contemplated by this Agreement and described in Exhibit 1 (the "Services"), which is incorporated by reference. This Agreement shall apply to all Services provided from time to time by Contractor to Client during the Term, as defined below.
2. **Deliverables:** Contractor shall provide all deliverables as described in Exhibit 1 (the "Deliverables").
3. **Payment:**
  - a. **[FIXED FEE:** Client shall pay Contractor an aggregate amount of \$32,500 to perform the Services. \$500 will be due immediately upon execution of this agreement. The aggregate amount shall be the sole and complete compensation for the Services performed by Contractor under this Agreement, including contingencies, direct and indirect expenses except as provided in Exhibit 1.] **[HOURLY FEE:** Client shall pay Contractor at the hourly rate of \$125 per hour to perform additional services outside the Scope of Service. Contractor shall not exceed \$1 without prior written approval by Client. The fee amount shall be the sole and complete compensation for Services performed outside the Scope of Service by Contractor under this Agreement, including contingencies, direct and indirect expenses except as provided in Exhibit 1.]
  - b. Contractor shall submit to Client biweekly reasonably detailed invoices describing the Services rendered during the invoice period, and such invoices shall become payable within thirty (30) days of receipt by Client. Invoices shall provide reasonable documentation of evidence of costs incurred including but not limited to:
    - i. **Staff charges:** for each employee, the name, title, number of hours worked and hourly rate; and,
    - ii. **Direct Materials/Other Direct Costs:** All direct materials and other direct costs shall be itemized on the invoice and supported by documentation such as vendor invoices, expense receipts, and proof of payment or other documentation as requested by Client.
4. **Term and Termination:**

- a. This Agreement shall take effect as of the Effective Date, and shall remain in effect until December 31, 2019 (the "Term"), unless terminated sooner under the provisions of this Section. Unless otherwise agreed in writing by the Parties, the Contractor shall perform the Services in accordance with the schedule in Exhibit 1 (the "Schedule").
  - b. This Agreement may be terminated by either Client or Contractor at any time for a material breach of any term of the Agreement. In the event of such termination, compensation shall be paid to the Contractor for the actual costs of allowable expenses incurred for work performed and the reasonable and necessary actual direct costs incurred in the performance of the work pursuant to this Agreement prior to the effective date of the termination.
  - c. Client may terminate this Agreement in the event of loss of availability of sufficient funds for the purposes of this Agreement or in the event of an unforeseen public emergency or other change of law mandating immediate Client action inconsistent with performing its obligations under this agreement.
  - d. Client may terminate this Agreement at any time, in the sole exercise of its discretion. In the event of such termination, compensation shall be paid to the Contractor for the actual costs of allowable expenses incurred for work performed and the reasonable and necessary actual direct costs incurred in the performance of the work pursuant to this Agreement prior to the effective date of the termination.
5. Access and Use:  
The Contractor warrants that their contribution will not infringe on any copyright, right of privacy, or personal or proprietary rights of others. If the Contractor delivers or uses materials subject to the rights of third parties (e.g., requiring permission from a copyright owner), the Contractor will provide all information required of the company to use such materials without infringing any copyright, right of privacy, or other personal proprietary right of another person or entity.

If the Contractor provides to Client or uses in the Contractor's Services any material in which they claim copyright, patent or other interests or rights for themselves, such use or delivery shall not be deemed to be an assignment of such material, interests and rights to Client, unless a contrary agreement is reached in writing, signed by an officer of Client, prior to such delivery or use.

6. Contractor's Representations, Warranties, and Certifications: As of the date of this Agreement, Contractor hereby represents, warrants and certifies under the pains and penalties of perjury as follows:
- a. Contractor is duly authorized to enter into this Agreement.
  - b. Contractor and all personnel to be utilized by Contractor under this Agreement ("Project Personnel") are fully capable and qualified to perform the described service(s) and Contractor's other obligations under this Agreement, and has obtained all requisite licenses and permits to perform such obligations.



- c. Contractor and its Project Personnel are familiar with, and are and will remain in compliance with, and will not take any actions contrary to the provisions of, any laws, rules, regulations, ordinances, orders or requirements of the State and other Governmental Authorities applicable to or implicated by the subject matter of this Agreement.
  - d. Contractor and its employees are independent contractors of Client, and not employees, partners or joint ventures of Client. Contractor will be solely responsible for withholding and paying all applicable payroll taxes of any nature, including social security and other social welfare taxes or contributions that may be due on amounts paid to its employees. Contractor has filed and will continue to file all necessary state tax returns and reports, and has paid and will continue to pay all taxes and has complied and will continue to comply with all laws of the State relating to contributions and payment in lieu of contributions to the Employment Security System, and with all laws of the State relating to Worker's Compensation.
  - e. Contractor shall secure and maintain all insurance, licenses and/or permits, perform all acts necessary or required for the performance of any Services required under this Agreement including, but not limited to, obtaining and maintaining appropriate insurance coverage for its activities under this Agreement through the Term appropriate. Contractor acknowledges the sufficiency of the types and amounts of insurance coverage maintained and the appropriateness of those coverages for the duration of the term. Upon request, the Contractor shall provide Client with appropriate documentation reflecting such insurance coverage and demonstrating compliance with applicable state and federal laws.
  - f. Contractor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion, or physical or mental handicap. Contractor agrees to comply with all applicable Federal and State statutes, rules and regulations prohibiting discrimination in employment including but not limited to: Title VII of the Civil Rights Act of 1964; the Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; and the Americans with Disabilities Act of 1990.
  - g. The Contractor represents and warrants that all personnel supplied under this Agreement are eligible to work in the United States at the time of execution of this Agreement and that Contractor has a continuing obligation to ensure such status for the duration of the Agreement.
7. Project Personnel:
- a. For Contractor: Karin VM Campbell, Dr. David R Campbell III
  - b. For Client: Kellie Cannon
8. **Notice:** Any notice hereunder shall be in writing and shall be sent either (i) by facsimile or other electronic transmission, (ii) by courier, or (iii) by first class mail, postage prepaid, addressed to the address of the parties as indicated in the preamble of this Agreement (or to such other address as a party may provide by notice to the party pursuant to this Section), and shall be effective (i) when dispatched if by facsimile or other electronic transmission, (ii) if sent by courier, one day after dispatch, (iii) if sent by first class mail, five days after its date of posting.

9. **Assignment and Subcontracting:** Client may assign its rights and obligations under this Agreement to any person who succeeds to all or any portion of Client's business, and all covenants and agreements hereunder shall inure to the benefit of and be enforceable by said successors or assigns. Contractor shall not assign or in any way transfer any interest in or any of Contractor's rights or obligations under this Agreement, including by operation of law, without the prior written consent of Client, nor shall Contractor subcontract any services to anyone without the prior written consent of Client.
10. **Conflicts of Interest:** Contractor and its subcontractors, if any, shall not take any action which it knows or has a reasonable basis to believe would cause any officer or employee of Client to participate in any decision relating to this Agreement which affects his/her personal interest or any corporation, partnership, or association in which they are directly or indirectly interested or to have any interest, direct or indirect, in this Agreement or the proceeds thereof.
11. **Audit:** Contractor shall maintain books, records and other compilations of data pertaining to its activities under this Agreement to the extent and in such detail as shall properly substantiate claims for payment and Contractor's performance of its duties under the Agreement. All such records shall be kept for a period of not less than three (3) years or for such longer period as is specified by Client (the "Retention Period"). The Retention Period starts on the first day after final payment under this Agreement is made. If any litigation, claim, negotiation, audit or other action involving the records is commenced prior to the expiration of the Retention Period, all records shall be retained until completion of the action and resolution of all issues resulting there from, or until the end of the Retention Period, whichever is later. The Client and their respective duly authorized representatives or designees shall have the right at reasonable times and upon reasonable notice, to examine and copy the books, records, and other compilations of data of Contractor which pertain to the provisions and requirements of the Agreement. Such access shall include on-site audits, reviews, and copying of records. If such audit reveals that any portion of the fees was utilized for purposes not permitted under this Agreement, then Contractor shall refund to Client the amount determined by such audit within ninety (90) days of Contractor's receipt of such audit and demand.
12. **Indemnification:** To the fullest extent permitted by law, Contractor shall indemnify and hold harmless the Client and each of their respective agents, officers, directors and employees (the "Covered Persons") from and against any and all liability, loss, claims, damages, fines, penalties, costs and expenses (including reasonable attorney's fees), judgments and awards (collectively, "Damages") sustained, incurred or suffered by or imposed upon any Covered Person resulting from (i) any breach of this Agreement or false representation of Contractor relating to this Agreement, (ii) any negligent acts or omissions or reckless or intentional misconduct of Contractor or any of Contractor's agents, officers, directors, employees or subcontractors, or (iii) the violation of any law by the Contractor or any of Contractor's agents, officers, directors, employees or subcontractors. Without limiting the foregoing, Contractor shall indemnify and hold harmless each Covered Person against any and all damages that may directly or indirectly arise out of or may be imposed because of the failure to comply with the provisions of applicable law by Contractor or any of its agents, officers, directors, employees or subcontractors.

In no event shall either party be liable for any indirect, incidental, special or consequential damages whatsoever (including but not limited to lost profits or

interruption of business) arising out of or related to the Services provided under this Agreement, even if advised of the possibility of such damages.

13. **Nonsolicitation and Noninterference:** During the term of this Agreement and for a period of one year after the termination, Contractor shall not, directly or indirectly, either for itself or on behalf of or through any other Person:
- a. recruit, solicit, entice or persuade (or attempt to recruit, solicit, entice or persuade) any Person who is (or at any time during the year prior to termination of this Agreement was) an employee, consultant, contractor, vendor or supplier of Client to leave the services of Client for any reason;
  - b. hire (or attempt to hire) any person who is (or at any time during the year prior to termination of this Agreement was) an employee of Client;
  - c. interfere with (or attempt to interfere with) Client's relations or arrangements with any Person who is (or at any time during the year prior to the termination of this Agreement was) an employee, or a consultant, Applicant, Contractor, Grantee Recipient, Respondent, customer, vendor, supplier or contractor of Client.

14. **Confidentiality:**

- a. Contractor hereby agrees to protect the physical security and restrict access to all data compiled for, used by, or otherwise in the possession of Contractor in performance of the services hereunder in accordance with Contractor's reasonable business practices and as otherwise provided in this Agreement. Contractor shall comply with all applicable laws and regulations relating to confidentiality and privacy.
- b. In connection with the performance of the Contractor's Services, Contractor will be exposed to and have access to Client's confidential and proprietary information and information that Client's employees, applicants, consultants, affiliates, licensors, customers, vendors, and others have entrusted to Client that may include, but is not limited to, trade secrets, know-how, or other intellectual property, financial and commercial information, marketing and servicing information, costs, business affairs, future plans, employee compensation, employee personnel information, programs, databases, operations and procedures (collectively, "Confidential Information") to which Contractor did not have access prior to performing Services of Client, and in which Confidential Information is of great value to Client. Contractor, at all times, both during and after any termination of this Agreement by either party, shall not in any manner, directly or indirectly, use any Confidential Information for Contractor's own benefit, or divulge, disclose or communicate in any manner, or otherwise make available such Confidential Information, unless expressly authorized to do so in writing by an officer of Client. Confidential Information shall not include (i) information which was in the public domain at the time of disclosure to Contractor; (ii) information which is or becomes generally known or available to the public through no act or failure to act on the part of Contractor; or (iii) information the disclosure of which is required by law or court order, provided the Contractor gives to Client prompt, prior written notice of any such disclosure.

- c. Contractor has read and agrees to comply with, and will cause its agents, officers, directors, employees and subcontractors to comply with, the provisions of this Section. Contractor agrees, for itself and for its agents, officers, directors, employees and subcontractors, as follows:
- i. not at any time, whether during or after the termination of this Agreement, to divulge, disclose or reveal to any Person any Confidential Information, whether or not such information is produced by Contractor's own efforts, except (A) as specifically required in connection with the fulfillment of Contractor's obligations hereunder, or (B) as otherwise directed by Client in connection with a disclosure request under a request for discovery, subpoena, court or administrative order or other compulsory legal process, disclosure requirement or request relating to such Confidential Information;
  - ii. not at any time, whether during or after the termination of this Agreement, use any Confidential Information for Contractor's direct or indirect financial or other benefit or for the benefit of any Person related to or affiliated with Contractor or with whom Contractor is now or hereafter associated, other than Client, nor will Contractor use or attempt to use any Confidential Information in any manner which could reasonably be expected to injure or cause loss, whether directly or indirectly, to Client or any Applicable Third Party;
  - iii. in the event that Contractor (or any of its agents, officers, directors employees or subcontractors) is questioned about Confidential Information by anyone who is not known by Contractor to be authorized to receive or have access to such Confidential Information, or is asked to provide Confidential Information to any such Person, Contractor agrees to promptly notify Client and respond to the inquirer in accordance with Client's instructions; and
  - iv. not at any time, whether during or after the termination of this Agreement, reproduce any materials containing Confidential Information except to the extent necessary to perform Contractor's obligations under this Agreement, nor make or use (or permit its employees or agents to use) any materials other than in connection with the performance of Contractors' obligations under this Agreement and for the benefit of Client, it being understood and agreed that all materials are, shall be and shall remain the sole and exclusive property of Client, and immediately upon the termination of the Agreement for any reason, Contractor shall deliver all copies of Client's confidential materials and all other property of Client in its direct or indirect possession or control to Client, at its main office. In addition Contractor shall, upon the termination of the Agreement, return all materials and Confidential Information, held by Contractor as data stored on computers, floppy disks, CD-ROMs, or other electronic media.
- d. Contractor shall collaborate with Client to prepare any public statement or announcement relating to or bearing on the work performed or data collected under this Agreement or to prepare any press release or for any news conference in which Client is concerned or discussed.

15. **Tax Forms:** Client will record payments to Contractor on, and provide to the Contractor, an Internal Revenue Service Form 1099, and Client will not withhold any state or federal employment taxes on the Contractor's behalf. The Contractor shall be responsible for paying all such taxes in a timely manner and as prescribed by law. Contractor shall provide Client with a properly completed United States Internal Revenue Service Tax Form W-9 (the "W-9"). Failure to provide the W-9 shall be grounds for withholding payment until such W-9 is received.
16. **Choice of Law:** This Agreement shall be construed under, and governed by, the laws of the State of Maryland, without giving effect to its conflict of laws principles. Contractor agrees to bring any Federal or State legal proceedings arising under this Agreement in which the State or Client is a party in a court of competent jurisdiction within the State of Maryland. However, no such action shall be instituted before the Parties submit the dispute to arbitration before the American Arbitration Association in Maryland and the arbitrator issues a final decision and award. Judgment upon any arbitration award may be entered in any court of competent jurisdiction. All parties shall cooperate in the process of arbitration for the purpose of expediting discovery and completing the arbitration proceedings. This Section shall not be construed to limit any other legal rights of the parties.
17. **Counterparts:** This Agreement may be executed in two or more counterparts, and by different parties hereto on separate counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument.
18. **Severability:** Each provision of this Agreement shall be treated as a separate and independent clause and any decision from a court of competent jurisdiction to the effect that any clause or provision of this Agreement is null or unenforceable shall in no way impair the validity, power or enforceability of any other clause or provision of this Agreement.
19. **Amendments and Waivers:** No amendments to or modifications of this Agreement, and no waiver of any provision hereof, shall be effective unless the same shall be in writing and shall be signed by each of the Parties hereto. Any waiver by Client of a breach of any provision of this Agreement shall not operate or be construed as a waiver of any subsequent breach of such provision or any other provision of this Agreement. Forbearance or indulgence in any form or manner by a Party shall not be construed as a waiver, no in any way limit the remedies available to that Party.
20. **Binding Effect. Entire Agreement:** This Agreement shall be binding on the parties hereto and their respective successors and permitted assigns and shall inure to the benefit of the parties and their respective successors and permitted assigns. Except as provided in the immediately preceding sentence, nothing in this Agreement shall be construed to create any rights or obligations except between the parties hereto, and no Person shall be regarded as a third party beneficiary of this Agreement. This Agreement embodies the entire understanding and agreement between the parties hereto with respect to the subject matter of this Agreement and supersedes all prior oral or written agreements and understandings relating to such subject matter. No statement, representation, warranty, covenant or agreement of any kind not set forth in this Agreement will affect, or be used to interpret, change or restrict, the express terms and provisions of this Agreement. Furthermore, neither Contractor's nor any of its subcontractors' provision of services under this Agreement implies, establishes or otherwise creates any rights or

expectations of additional contracts with the Client, whether related or unrelated to the subject matter of this

Agreement. The following (together with all exhibits, schedules and attachments) are hereby incorporated into this Agreement by reference:

- a. Exhibit 1: Request for Proposal and Paypoint HR response to same.

In witness whereof, the parties have caused this Agreement to be executed as a document under seal as of the Effective Date.

University City, Missouri      Paypoint HR, LLC

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

By: \_\_\_\_\_  
Name: Karin VM Campbell  
Title: CEO  
Date: \_\_\_\_\_

Exhibit 1:

**Appendix - Sample PVP Job Description Survey**

# Position Vantage Point

- Education
- Certifications
- Work Duties
- Work Experience

Background

- Complexity
- Independence
- Impact

Skill

Environment

Authority

- Physical
- Working Conditions
- Interaction

- Financial
- Supervision

You agree that the person who has completed the questionnaire is the same as the person identified in the Background section, you agree the information is true and accurate to the best of your ability, and you understand this information will be used to help develop a job description for your job title.

\_\_\_\_\_  
Signature



# Position Vantage Point

## Background

First Name

Last Name

Department

Job Title

### Job Category

- Administrative *(e.g., Accounts Payable, Admin. Assistant, Secretary)*
- Education *(e.g., Teacher, Librarian, Social Worker)*
- Executive *(e.g., Department Head, Assessor)*
- Fire & Rescue *(non-administrative)*
- Laborer *(e.g., Bus Driver, Custodian, Maintenance)*
- Law Enforcement *(non-administrative)*
- Professional *(e.g., Accountant, Marketing, Engineer, Lawyer)*
- Skilled Trade *(e.g., Mechanical/Electrical/Water Inspector)*
- Trade Supervisor *(e.g., Shift Supervisor, Foreman)*
- Other *(Other)*

### Status

- Full-Time  Part-Time

Work Week (Hours)

Supervisor Name

Job Description

# Position Vantage Point

## Background (cont.)

### Highest Education Level You Have Achieved

- High School
- High School Diploma/GED
- Trade School Certificate
- Associate Degree in a Related Field (AA/AS)
- Associate Degree Not in a Related Field (AA/AS)
- Bachelor Degree in a Related Field (BA/BS)
- Bachelor Degree Not in a Related Field (BA/BS)
- Master Degree in a Related Field (MA/MS/MBA)
- Master Degree Not in a Related Field (MA/MS/MBA)
- Specialist Degree in a Related Field
- Specialist Degree Not in a Related Field
- Doctorate Degree in a Related Field (PhD/JD/EdD)
- Doctorate Degree Not in a Related Field (PhD/JD/EdD)
- Other

### Minimum Education Level that Should be Required for Job Title

- High School
- High School Diploma/GED
- Trade School Certificate
- Associate Degree in a Related Field (AA/AS)
- Associate Degree Not in a Related Field (AA/AS)
- Bachelor Degree in a Related Field (BA/BS)
- Bachelor Degree Not in a Related Field (BA/BS)
- Master Degree in a Related Field (MA/MS/MBA)
- Master Degree Not in a Related Field (MA/MS/MBA)
- Specialist Degree in a Related Field
- Specialist Degree Not in a Related Field
- Doctorate Degree in a Related Field (PhD/JD/EdD)
- Doctorate Degree Not in a Related Field (PhD/JD/EdD)
- Other

### Required Certifications for Current Job Title

# Position Vantage Point

## Background (cont.)

### Work Duties

(Importance (1 highest/10 lowest), Percentage of time (0 to 100), and Task Description)

1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

### Your Relevant Work Experience

In Current Job Title with Current Employer (years)	
In All Job Titles with Current Employer (years)	
In Current Job Title with All Employers (years)	
Min Required for Current Job Title (years)	

### Comments

--

# Position Vantage Point

## Skill

### Complexity Question #1

*This position primarily involves routine or repetitive tasks, processes, or operations involving the application of well-defined rules, procedures, policies, guidelines, and/or instructions.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Complexity Question #2

*This position primarily involves generally standardized tasks, processes, or operations involving the choice of action within well-defined rules, procedures, policies, guidelines, and/or instructions.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Complexity Question #3

*This position primarily involves generally diversified tasks, processes, or operations involving the choice of action within well-defined rules, procedures, policies, guidelines, and/or instructions.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Complexity Question #4

*This position primarily involves occasionally complex and diversified tasks, processes, or operations involving the development of rules, procedures, policies, guidelines, and/or instructions.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Complexity Question #5

*This position primarily involves often complex and diversified tasks, processes, or operations involving the development of rules, procedures, policies, guidelines, and/or instructions.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

## Skill (cont.)

### Independence Question #1

*My position primarily involves detailed work instructions with close supervisory review.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Independence Question #2

*My position primarily involves detailed work instructions with regular supervisory review.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Independence Question #3

*My position primarily involves general work instructions with regular supervisory review.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Independence Question #4

*My position primarily involves broad latitude on work tasks with regular supervisory review.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Independence Question #5

*My position primarily involves broad latitude on work tasks with minimal supervisory review.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

## Skill (cont.)

### Impact Question #1

*Mistakes made in my position typically lead to only minor costs, waste, or inconvenience.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Impact Question #2

*Mistakes made in my position may lead to some costs, waste, or inconvenience.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Impact Question #3

*Mistakes made in my position may lead to significant costs, waste, or inconvenience.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Impact Question #4

*Mistakes made in my position may lead to major costs, waste, or inconvenience and short-term impact to the direction, goals, and reputation of the organization.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Impact Question #5

*Mistakes made in my position may lead to major costs, waste, or inconvenience and long-term impact to the direction, goals, and reputation of the organization.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

# Position Vantage Point

## Environment

### Physical Question #1

*My position is not strenuous.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Physical Question #2

*My position is slightly strenuous often requiring minimal physical exertion and/or lifting of light weight (< 20 pounds).*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Physical Question #3

*My position is somewhat strenuous often requiring some physical exertion and/or lifting of moderate weight (< 40 pounds).*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Physical Question #4

*My position is strenuous often requiring physical exertion and/or lifting of heavy weight (< 60 pounds).*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Physical Question #5

*My position is very strenuous often requiring substantial physical exertion and/or lifting of very heavy weight (> 60 pounds).*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

# Position Vantage Point

## Environment (cont.)

### Working Condition Question #1

*My position is located in a mild/non-hazardous working environment.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Working Condition Question #2

*My position often involves occasional exposure to uncomfortable temperature noise, chemicals/gases, contagious diseases, and/or physical trauma.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Working Condition Question #3

*My position often involves frequent exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, and/or physical trauma.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Working Condition Question #4

*My position often involves consistent exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, and/or physical trauma.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Working Condition Question #5

*My position often involves potentially life-threatening exposure temperature, noise, chemical/gases, contagious diseases, and/or physical trauma.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree



# Position Vantage Point

## Environment (cont.)

### Interaction Question #1

*My position does not require regular interaction with employees or supervisors outside of those in my work area.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Interaction Question #2

*My position requires regular interaction with employees and supervisors of other departments.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Interaction Question #3

*My position requires regular interaction with administrative and technical staff including those outside the organization, i.e., vendors.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Interaction Question #4

*My position requires regular interaction with executive level employees, senior managers, and directors.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Interaction Question #5

*My position requires regular interaction with individuals outside the organization including community leaders, citizens, and the media.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

# Position Vantage Point

## Authority

### Financial Question #1

*My position is not involved in financial/budgetary matters.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Financial Question #2

*My position is involved with financial/budgetary matters including purchase orders, payments, grant funds, employee benefits, and the like.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Financial Question #3

*My position manages the budget for the department / work unit.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Financial Question #4

*My position allocates funds for the various departments / work units.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Financial Question #5

*My position has purchasing authority without approval by another individual or external authority up to:*

- None
- Less than \$1,000
- Less than \$2,500
- Less than \$5,000
- Less than \$10,000
- Less than \$25,000
- Less than \$50,000
- More than \$50,000

# Position Vantage Point

## Authority (cont.)

### Supervision Question #1

*My position has no supervisory responsibility/authority.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Supervision Question #2

*My position involves the training and guidance of employees and the assignment, review, and approval of the work of others.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Supervision Question #3

*Number of employees from Question #2.* \_\_\_\_\_

### Supervision Question #4

*My position is a managerial position involving work evaluation and employee supervision including hiring, promotion, and termination without approval by another individual or external authority.*

- Strongly agree
- Somewhat agree
- Neither agree nor disagree (50/50)
- Somewhat disagree
- Strongly disagree

### Supervision Question #5

*Number of employees from Question #4.* \_\_\_\_\_

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### Comments



**Proposal for Services  
City of Universal City, MO  
Compensation and Classification  
March 9, 2018**



Rebecca G. Crowder, President  
Elizabeth Tatarko, Vice President  
P.O. Box 27196  
Overland Park, Kansas 66225  
Ph (913) 851-7530  
Fax (913) 851-7529  
bcrowder@austinpeters.com  
www.austinpeters.com





March 9, 2018

Kellie Cannon  
Human Resources Manager  
6801 Delmar Blvd.  
University City, MO 63130

Dear Ms. Cannon:

Enclosed, please find a multi-phase human resource proposal for University City. This proposal covers 260 full-time positions, as outlined by the RFP. Our proposal includes: a job compensation and classification study for different pay grades focusing on internal and external equity, development and revision of job descriptions, and determination of FLSA (Fair Labor Standards Act) classification.

We have an extensive background working with city and county government, elected officials, and public-sector employees on these types of projects. I have personally worked in local government as a budget analyst for the largest county in Kansas City, as a management assistant for the City of Janesville, Wisconsin with duties covering all of public works, planning, building inspection, water/wastewater, solid waste and a landfill, and as a Human Resource Manager for a City.

Our depth of experience with other cities and counties of similar size is a plus in this proposal. This proposal is valid for 90 days. We look forward to talking with you to discuss your needs.

Sincerely,

Overland Park, Kansas 66225  
Ph (913) 851-7530  
bcrowder@austinpeters.com



# 1) Firm Background and Representative Clients

The Austin Peters Group, Inc.  
P.O. Box 27196  
Overland Park, Kansas 66225  
Ph (913) 851-7530  
bcrowder@austinpeters.com  
[www.austinpeters.com](http://www.austinpeters.com)

The Austin Peters Group, Inc. (APG) is a corporation established in 1998. The company is incorporated in the state of Kansas. It is a privately owned, certified Women Business Enterprise (WBE). APG is co-owned by Rebecca Crowder, President, and Elizabeth Tatarko, Vice-President. Rebecca Crowder will be the primary contact for the project.

A small company based in Overland Park, Kansas, The Austin Peters Group combines the experience and energy to provide high-quality, tailored products that meet the demands of our customers. The firm prides itself in being highly responsive to its client needs.

**The Austin Peters Group has completed projects similar to this for over 120 local governments. We have been assisting local governments since 1998.**

**Bryan Richison**  
City Administrator  
City of Arnold  
2101 Jeffco Blvd.  
Arnold, MO 63010  
636-282-2383  
brichison@arnoldmo.org

**Ms. Gail Strope**  
Human Resource Director  
City of Jefferson  
320 E. McCarty  
Jefferson City, MO 65101  
(573) 634-6529  
gstrope@jeffcitymo.org



**Mr. Darren Lamb**  
City Administrator  
City of Washington  
405 Jefferson Street  
Washington, MO 63090  
(636) 390-1000  
DLamb@ci.washington.mo.us

**Ms. Marva Viley**  
Human Resource Director  
City of Moberly  
101 West Reed Street  
Moberly, MO 65270  
(660) 269-8705 x2070  
mv@cityofmoberly.com

**Ms. Laura Smith**  
City Administrator  
City of Mission  
6090 Woodson  
Mission, KS 66202  
(913) 676-8352  
lsmith@missionks.org

## 2) Staff Assigned to Project

### Project Manager and Team

The following is an overview of our project team, which includes qualifications, education, professional registrations, and areas and years of service in the respective field.

#### **Elizabeth Tatarko, Masters in Urban Planning—Vice President**

Elizabeth has served local and state government—as well as non-profit organizations—for more than 25 years. Prior to joining The Austin Peters Group, she was the Assistant Director of the Kansas Center for Rural Initiatives at Kansas State University.

Elizabeth has provided technical assistance to more than 200 local, regional, and state organizations. She provides expertise in -- evaluation and survey design; community and economic development; citizen involvement; community participation; conflict resolution; focus groups; and strategic planning.

Over the past several years, Elizabeth has co-authored nearly all of the studies undertaken by The Austin Peters Group, Inc., for local governments and worked directly with nearly all of Austin Peters Group, Inc.'s 80 local government clients, and worked with more than 20 communities in citizen attitude survey research, focus group research, and individual interviews. She has also served as a program evaluator for university and state government programs.

Elizabeth has served as an organizer and leader for training programs that have reached more than 5,000 persons. She received specialized training in conducting focus groups from the University of Minnesota under the guidance of Dr. Richard Krueger, the national leader in this field. She holds a Bachelor of Science in Political Science and a Master of Science in Regional and Community Planning from Kansas State University.

Elizabeth was the Project Manager for Johnson County's Performance Evaluation program involving more than 4,000 employees. She also served as co-project manager for the Ford County Organizational Assessment. Professional memberships and certifications: APA, Myers Briggs Type Indicator, DDI Trainer, Center for Creative Leadership graduate, Focus Group Facilitator University of Minnesota. Training and experience includes all major projects in partial list below.

**Project Responsibility:** Co-Project Manager, responsible for oversight and detailed involvement of entire project.

## **Rebecca Crowder, Masters in Public Administration, SPHR—President**

The founder and President of The Austin Peters Group, Inc., Rebecca has more than 25 years of local government management experience. Rebecca has provided management assistance to over 200 local government clients on a variety of management issues. She has researched and authored more than 200 studies. Rebecca has organized and led training programs for over 5,000 participants on issues such as diversity awareness, human resource management, team building, budget and finance, role of boards, goal setting and strategic planning. Past positions -- Human Resource/Administrative Services Director—Merriam, Kansas; Management Consultant—University of Tennessee Municipal Technical Advisory Service; Management Assistant—Janesville, Wisconsin; Budget Analyst—Johnson County, Kansas.

Rebecca's extensive local government experience has touched all local service areas, including: police, fire, public works, engineering, water, wastewater, building inspection, planning, solid waste, library, mental retardation services, administration, county elected officials, courts and juvenile justice, and more. She holds a Bachelor of Arts in Political Science from Kansas State University and a Master of Public Administration from the University of Missouri at Columbia. Rebecca served as National Society for Human Resource Certification instructor for four years at Washburn University, teaching the compensation and classification certification (among others). She has led all projects listed in experience statement. Professional memberships and certifications: ICMA, SHRM, DDI Trainer, Zenger Miller Trainer.

**Project Responsibility:** Project Manager, responsible for oversight and detailed involvement of entire project.

## **Marla Flentje, Masters in Public Administration—Senior Consultant (independent contractor)**

Marla has over 20 years' experience in consulting, facilitating, and teaching professional development programs for state, local, and community organizations. For several years, she has organized the annual Kansas Association of Counties compensation survey with 105 counties.

Marla has served as director for a state university-based unit that provides research, support, and technical assistance to local governments. She holds a Master's degree in Public Administration from Wichita State University. Marla was instrumental in the facilitation of the Johnson County, Kansas performance evaluation program. Professional memberships and certifications include ICMA and Conflict Resolution and Management. Ms. Flentje works as an independent consultant for The Austin Peters Group.

### **Jay Crowder, Masters in Human Development, SPHR—Senior Consultant**

Jay has held leadership and professional positions in two Fortune 250 companies and in County government. His 25 years of experience are in the areas of -- affirmative action; fair employment practices (ADA, FMLA, Title VII); human resource planning; recruitment; compensation; performance management; 360-degree evaluation process; employee relations; training and development; employee relocation; union avoidance; worker's compensation; and immigration.

Jay holds a Bachelor's Degree in Human Development from the University of Kansas and a Master's Degree in Human Resource Development from Vanderbilt University. Training and experience include specific studies, as well as the former Classification and Compensation Analyst for Johnson County, Kansas (current employees total over 4,000). Professional memberships and certifications include ICMA, SHRM.

### **Michelle Schamberger, Masters in English—Consultant**

Michelle has more than 15 years of experience in writing. She is experienced in E-business research, writing, and website development. Michelle has been an instructional designer and technical writer for training, specializing in use of multimedia. Michelle has a Bachelor of Arts in English, a Master of Arts in English, and a Proficiency Certificate in French Studies. Michelle has been with The Austin Peters Group, Inc. for 14 years and prior to that was an Educational Consultant for Sprint Corporation. She has served as an Adjunct Instructor, Colorado Mountain College, University of Missouri Kansas City, Penn Valley Community College, and Johnson County Community College.

### **Peter Tatarko, Bachelor of Science in Political Science —Consultant**

Peter has worked for APG for many years and is nearing the completion of his graduate degree at Kansas State University in Public Administration. He works on salary and benefit studies, collecting and analyzing data for employee surveys, and developing advanced applications for sorting and managing large data sets. Prior to his recent return to APG, he was a consultant with Cerner Corporation working with clients on project implementation, traveling the United States.

## **3) Outline of Firm's Experience**

### **Partial List of Clients**

Below is a partial list of clients, and more specific information is available upon request. Private sector clients are not listed.

### **City of Arnold, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project is currently being completed for all employees.

### **City of Jefferson City, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was completed for over 400 employees.

### **City of Maryville, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was completed for all employees.

### **City of Mexico, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project is currently being completed for all employees.

### **City of Moberly, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was completed for all employees.

### **City of Washington, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities

Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was completed for all employees.

### **City of Warrensburg, Missouri**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project is currently underway and includes all employees.

### **Routt County, Colorado**

This project was an extensive market evaluation of all full-time and part-time positions. The classification and compensation study was accomplished in coordination with the market review and update for over 170 positions. The salary and benefit survey involved working with more than 20 participants to determine market recommendations for wages and benefits. All employees were interviewed as a part of the process, and the consultants worked hand-in-hand with administration and the governing body to implement recommendations.

### **City of Bonner Springs, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **City of Hesston, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **City of Iowa City, Iowa**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities

Act functions, along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **City of La Vista, Nebraska**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **City of Newton, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Flint Hills Services**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Butler County, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Geary County, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities

Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Harvey County, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Riley County, Kansas**

This project was conducted with all full-time employees. A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. The classification and compensation study was accomplished in coordination with the job description revision. The salary and benefit survey was conducted for an external review of the market.

### **Pottawatomie County, Kansas**

A revision of job descriptions was conducted for a more thorough review of Americans with Disabilities Act functions along with more accurate descriptions. A classification and compensation study was accomplished in coordination with the job description revision. A salary and benefit survey was conducted for an external review of the market. This project was conducted with all full-time employees.

### **Johnson County, Kansas**

APG facilitated system-wide implementation of performance evaluation system for more than 4,000 employees.

### **City of La Vista, Nebraska**

After the City adopted a pay study and had their strategic plan updated by the consulting team, the team developed low-cost solutions to their pay-for-performance system.



### **City of North Liberty, Iowa**

After the City adopted a pay structure, the consulting team guided implementation of a pay-for-performance system that has customizable performance factors.

### **Flint Hills Services**

After the organization adopted a pay structure, the consulting team guided implementation of a pay-for-performance system that has customizable performance factors.

### **Rice County**

After the County adopted a pay structure, the consulting team guided implementation of a pay-for-performance system that has customizable performance factors.

### **City of Bonner Springs, Kansas**

After the City adopted a pay structure, the consulting team guided the implementation of a pay-for-performance system that has customizable performance factors.

### **Sprint—Worldwide**

Three consultants have been involved in design, implementation, and training for Sprint's performance evaluation.

### **US Army, Navy, Marines**

Two consultants have been involved in design and delivery of specific training for performance evaluation.

## 4) Firm's Approach

### Scope of Work

#### *A. Compensation and Classification Analysis*

##### **Job Audit and Analysis - Internal Equity (First Step of the Classification and Analysis Process)**

The Austin Peters Group reviews the current compensation and pay ranges for the City's positions. The Austin Peters Group will evaluate jobs for internal equity using the following factors:

- Supervisory
- Knowledge and experience
- Budgetary
- Decision making
- Public contact
- Working conditions
- Physical requirements

During the initial meeting process with the City team, the key factors will be reviewed and a determination will be provided regarding factors and weighting.

During the initial meeting the process, tasks to be performed, intended outcomes, staff availability, and points of contact will be addressed.

Prior to the first meeting the consulting team will have received the background materials in order to be prepared.

During this process, the consulting team will meet with department heads and managers to: discuss positions, confirm job description content, and answer general questions about the position's responsibilities. The team will also conduct worksite tours. The combination of **interviews and onsite observations** provides an understanding to initially complete the internal equity process.

The department heads will review the results for their departments and provide feedback to the consulting team regarding position evaluation or job ranking. Additionally, a management

representative or human resource representative will review a preliminary job ranking and market analysis and provide the consulting team with feedback on their findings.

### **External Equity (Second Step of the Classification and Evaluation Process)**

Positions will be evaluated in comparison to local economic market conditions for entry-level, professional, and management personnel. In order to accomplish the external market review of positions, ten or more comparable organizations (*e.g.* similar cities) and ten local employers including private-sector market competitors will be surveyed as determined by the City Management. Respondents will receive a summary of the position being surveyed, and will be asked to score how closely the respondent's position matches the benchmark position in the survey. This assists the consultant with determination of content and duty comparisons.

After surveys are received, the consultant often communicates with the respondents to confirm information and responses or review job descriptions. Department heads will be interviewed and surveyed regarding market competition and staffing turnover to ensure that critical positions are surveyed.

Further, department heads are often consulted regarding respondents who have similar or different structures and organizations to ensure that there is good data. External data sources may be used in lieu of a full survey.

At least 50 positions will be surveyed and used as benchmark positions for extrapolating data to groupings (or classes) of positions. Every effort will be made to have a minimum of eight responses for each position surveyed. Additional organization information will be collected in the market survey to include: insurance plans and descriptions, employer contributions for single and family health insurance, employer provided vacation and leave policies. Detailed information on the type of insurance plan (deductibles, monthly premiums, percent of premium covered by employer/employee for health, vision, dental, and level of self-insurance will be included). Wages will be compiled by hourly wages. Retirement plan data will be collected as well as additional options for contributions.

The final report will demonstrate each response and provide a summary of (as well as graphic and numerical differences between) the City and its respondents. The report will outline where the City currently stands in the market, and what steps would be necessary to lead, meet, or lag the market. APG will also ask market participants for information on recent pay increases and future planned increases.

## **Classification, Pay Schedule, Administration, Implementation (Final Step of the Classification and Evaluation Process)**

The consulting team will place all positions into pay ranges or classifications based on using a scoring system for the following factors:

- Supervisory
- Knowledge and experience
- Budgetary
- Decision making
- Public contact
- Working conditions
- Physical requirements

Pay ranges will be a set number and market findings will guide each classification recommendation. Flexibility between ranges for future placements (those will be outlined as “reserved for future placements” in the recommendations) will be included if needed.

The Austin Peters Group will provide a draft of these findings to the management contact for feedback. The consultants will use the management contact representative to help guide recommended changes in compensation strategies, as outlined in the request for proposal. We will also provide strategies and connections with flexible pay structures and alternative cost impacts as appropriate.

### **Maintenance of a Plan**

For future maintenance of a pay plan system, the guidebook, spreadsheets, and electronic documents will be handed over to the appropriate personnel. Additional policies will be provided to help maintain the system, including:

- Pay practices administration
- Movement of pay ranges
- Longevity
- Topping out at pay range maximum
- Being below pay range minimum
- Other policy options

The consulting team will develop costing scenarios. The consulting team will outline and prioritize implementation, while minimizing employer costs.

The Austin Peters Group will prepare final report which will include:

- Methods used to conduct the salary survey results and methodology of job evaluation
- Summarize position comparison data
- Summarize benefit comparison data
- Recommended classification plan
- Recommended pay structure
- Recommended benefit changes, if any
- Recommendations to maintain future market competitiveness
- Other recommendations

Final documents will form a **guidebook for implementation**. These documents will be provided in an electronic format, for human resources staff (and other key staff). Consultants will spend time with staff reviewing the documents and providing training for implementation.

## ***B. Job Description Development***

The Austin Peters Group's objective is to review, modify, and/or create job descriptions with the goal of bringing the City's job descriptions in line with the employment market and best practice guidelines. The development of job descriptions will focus on responsibilities and duties, qualifications, working conditions, physical requirements, and other relevant information such as certifications and whether the position is in a supervisory role. The requirements for performing the position under a minimum and preferred standard will be outlined by education and/or experience depending on the role, along with additional requirements to be in compliance with equal employment opportunity and American with Disabilities Act (Amended).

The person in the position (or the supervisor) will fill out a questionnaire that guides the consultant in developing the job description. The questionnaire will include an attached current job description that has been reviewed by the employee and department head. The questionnaire will ask additional questions which help guide in the job description update, which will include:

1. Appropriate questions related to classification as exempt or non-exempt under the Fair Labor Standards Act (FLSA) for some positions if unclear
2. Compliance with the current Americans with Disabilities Act (as amended)
3. Appropriate physical and non-physical requirements
4. Working conditions
5. Essential and marginal duties that are specific to the position

6. Qualifications (education and/or experience), licensing/certification, specifications (knowledge, skills and abilities), accountabilities, and organizational relationships

The consultant will draft the job description and will clarify with department heads any discrepancies. Once the job description has been completed they will be given to the Human Resources Manager for final internal approval. The job descriptions will be provided in a uniform format that is consistent with the City's other job descriptions.

### ***C. Training***

The consulting team has learned over the last several years that it is not enough to provide clients with outcomes and processes for compensation and classification studies. Staff training can be a key component to successful outcomes. The consulting team will hold a mock training session with the human resource staff and leadership team with "fake" non-City positions to demonstrate how internal equity and market equity are conducted by the consulting team. These mock exercises greatly affect participant understanding of the process and further enhance communication. This will also help maintain the system and address future requests for reclassification, which the team will provide guidance to address. The Austin Peters Group believes if we train a team and they are comfortable with the process, there will be more success in maintaining the system in the future.

### ***D. Project Communication***

Austin Peters Group will keep parties informed through the process; this has ensured our overall success rate of 98% implementation. In projects of this nature, each area is deemed critical.

#### **Governing Body**

At the start of the project, we propose a meeting with officials, which is used to develop a common understanding of the project and a direction with the City. At the end of the project, the team will also present findings to the City officials.

#### **Employee Communications**

The consulting team begins the communication process with a letter to all employees outlining expectations, the purpose of the study, and how employees can contact the consulting team at any point in the process to clarify or ask questions.

During the beginning when the consulting team is onsite, there will be:

- Three kick-off/orientation meetings where employees can ask questions and receive answers

- Open-door policy, where employees may call consultants at any time

All employees will be asked to complete a position questionnaire (these are usually completed in teams by position, or individually at the employee's choosing), which will form the basis of the employee interviews, along with job descriptions. Next, the consulting team will interview all employees by position during a 20-minute process to determine the scope of the position responsibilities, internal equity factors, market influences, and current job description. This is important to "updating" the job description. For those employees on different shifts, additional interview times will be added to accommodate as many employees as possible.

Following the interviews, the department head or designee will lead an onsite/worksite visit or tour where the consulting team can observe employees at work, first-hand. After this step, employees may pose questions to their department head, or to the consulting team directly. Usually, employees are eager to respond to consultant's questions and provide follow-up information.

At the end of the process, employees will receive a personal letter indicating the specific impact that the recommendations have on their position. This letter also specifies how and when the employees will have an opportunity to ask the consulting team questions.

### **City Team/Stakeholder/Department Head**

The City Administrator, department heads, and Human Resources form the backbone of communication between the consulting team and the employees. It is critical to the project's success that they actively participate with the consulting team in the process.

At the beginning of the process, there will be several City Team/Stakeholder meetings. Information will be exchanged between the consultants and the department heads several times on the phone, in writing, face-to-face, and via email. The City Administrator and Department Heads will also be interviewed in a more extensive way regarding department background, organization, culture, and internal/external department issues.

The consulting team will conduct site visits and worksite visits with the department head's assistance. This allows the team to see first-hand the requirements of the position.

The consulting team will meet with the human resource representative or designated contact during each onsite visit. The consulting team's initial discussion with management or the human resource representative sets the parameters and expectations that drive project recommendations.

## Regular Updates

The consulting team will provide a bi-weekly or weekly update to the Human Resources Manager. The consultants will discuss scope of work complete, data collection, schedule and progress, challenges, and provide updates or changes. Further, the consulting team will provide regular updates to the City Team on project progress as instructed by the City.

## Roles Overview

Throughout the study and during each phase the role of The Austin Peters Group, University City, and its workforce is a partnership. Below is an outline of roles and involvement:

### Employees

**Compensation and Classification Analysis**—Employees will be involved in position questionnaires, face-to-face interviews by positions, consulting team on-site department tours, three employee question-and-answer sessions, open-door policy on our behalf that they can contact us any time. Employees will receive a specific letter using a template APG will provide to the city regarding recommendations prior to adoption.

**Job Description Development**—Employees will be directly involved in providing input for their position description. APG uses an interview process to update and integrate changes into current descriptions. If a description does not exist, employees will be involved in position questionnaires and face-to-face interviews by positions to assist in development of new job descriptions.

### City Team/Stakeholder Group: Administration and Department Heads/Elected Officials

**Compensation and Classification Analysis** —Administration and department heads will be involved at the same level as employees. In addition, they will help with a specific questionnaire about the market, they will receive specific training on the criteria used to evaluate positions, they will receive drafts (sometimes several) of their direct reports' information and will provide comments, and they will receive pay range recommendations prior to final presentation to the governing body. The City Team/Stakeholder group will meet initially with the consulting team at the start of the project and continuously at each stage. Generally speaking, additional review and meetings are required with the City Administrator, Assistant City Administrator, Human Resources Manager, and possibly the Finance Director.

**Job Description Development** — Administration and department heads will be involved at the



same level as employees. In addition, they will help with editing, they will receive drafts (sometimes several) of their direct reports' information and will provide comments, and they will receive documents prior to governing body receipt. The City Team/Stakeholder group will meet initially with the consulting team at the start of the project.

## **Governing Body**

**Compensation and Classification Analysis** — The consulting team will meet with the governing body (if they wish) prior to the project commencing to answer strategic and policy questions, and provide overall direction to the consulting team. The consulting team will meet with the governing body to present findings in a work session or other format as appropriate.

**Job Description Development** — The consulting team will meet with the governing body to present findings in a work session or other format as appropriate. The governing body will have final copies of all job descriptions or as directed by management.

## **City Staff Support**

The City will provide the following support:

- Arrange for all meetings, including arranging meeting space and providing meeting confirmation
- Copy and distribute memos, questionnaires, information to employees in a timely manner (as requested by the consulting team)
- Provide copies of all job descriptions (MS Word format), job classifications, pay plans, existing classifications, pay ranges by employee (MS Excel format), and provide copies of all wage and salary schedules (MS Excel format)
- Provide copies of prior studies/documents (if the City deems appropriate)
- Provide a listing of all employee names, titles, departments, supervisors, years of service, last pay raises, current salaries, annual overtime salaries, exempt versus non-exempt status, and current ranges (in MS Excel format)
- Ensure manager accountability in keeping the project schedule moving
- Provide copies of personnel policies and handbooks (electronically, if possible)
- Provide copies of organizational chart, City's mission, vision, strategic planning documents
- Provide organizational charts, budgets, and other related information
- Provide any previous studies on health insurance, salary, satisfaction surveys, exit interview data, turn-over data, attitude surveys, information about where employees

who leave the City go to work, etc

- Provide background documents so that we have a thorough understanding of past practices and future goals for the City

## Final Product

The Austin Peters Group will:

1. Provide a classification structure that consolidates the current system and/or creates classifications, and recommend the appropriate assignment for all City positions within this structure. Provide appropriate implementation and maintenance manuals
2. Provide a Fair Labor Standards audit and report for any changes in exemptions
3. Develop a competitive pay structure for all jobs using the point factor evaluation process. Pay structure shall be in MS Excel format
4. Identify the methodology and point scheme used to evaluate each job, and the total points assigned to each job and placement points used within each pay grade
5. Reflect minimum, midpoint and maximum range for each pay grade
6. Make recommendations if appropriate for any changes in hire rates, promotion rates, demotion rates, incentive and certification pay, on-call compensation, and other monetary incentives such as wellness incentives, longevity and other issues specific to the City of University City. This includes how to effectively deal with pay compression that may currently exist or result with any range adjustments
7. Provide the City with a simplistic and manageable system that outlines methodology, findings, conclusions and recommendations
8. Provide job analysis questionnaire and procedures for updating and creating future positions
9. Provide job descriptions for each position that uniformly reflect distinguishing characteristics, essential and marginal job functions, minimum qualifications, physical and working conditions, license requirements, regulatory requirements, and special responsibilities. The consultant will ensure that all classifications/positions are in full compliance with all applicable federal and state statutes and regulations, including the Americans with Disabilities Act
10. Develop and fully define in writing a systematic procedure for evaluating positions using the "point factor method." Provide worksheets for departments to request a job evaluation for an upgrade within a position or new position for submission to the Human Resources Department. Provide worksheets for Human Resources Department personnel to perform future job evaluations or upgrades

## **5) Data Collection Process**

### **External Equity (Second Step of the Classification and Evaluation Process)**

Positions will be evaluated in comparison to local economic market conditions for entry-level, professional, and management personnel. In order to accomplish the external market review of positions, ten or more comparable organizations (e.g. similar cities) and ten or more local private-sector market competitors will be surveyed as determined by the City Management.

Respondents will receive a summary of the position being surveyed, and will be asked to score how closely the respondent's position matches the benchmark position in the survey. This assists the consultant with determination of content and duty comparisons.

After surveys are received, the consultant often communicates with the respondents to confirm information and responses or review job descriptions. Department heads will be interviewed and surveyed regarding market competition and staffing turnover to ensure that critical positions are surveyed.

Further, department heads are often consulted regarding respondents who have similar or different structures and organizations to ensure that there is good data. External data sources may be used in lieu of a full survey.

At least 50 positions will be surveyed and used as benchmark positions for extrapolating data to groupings (or classes) of positions. Every effort will be made to have a minimum of eight responses for each position surveyed. Additional organization information will be collected in the market survey to include: insurance plans and descriptions, employer contributions for single, family, vacation and leave policies.

The final report will demonstrate each response and provide a summary of (as well as graphic and numerical differences between) the City and its respondents. Benefits data will be collected from each respondent, and that information will also be calculated into comparative data for health insurance benefits, and other descriptive information will be summarized. The report will outline where the City currently stands in the market, and what steps would be necessary to lead, meet, or lag the market.

## 6) Time Schedule for Project Completion

Completion Date	Task	Responsible	Deliverables
	Letter of agreement	University City	Returns signed copy to the Austin Peters Group and processes invoice for deposit.
	Meeting with City Team/Stakeholders regarding project. Hold a minimum of three employee meetings for orientation and kick off of project.	Austin Peters Group/ University City	The consulting team meets with the City Team/Stakeholder Group to answer a set of questions that will direct the consulting team in development of recommendations. Employee orientation sessions are held.
<b>Week 1-3</b>	Market questionnaire delivered to City department head only	Austin Peters Group/ University City	Questionnaires are delivered electronically. Market questionnaire is filled out by the department head and returned by day 5 via fax to the Austin Peters Group (913-851-7529).
	Market questionnaire from department head	Austin Peters Group	Department heads answer questions required for market study process to start.
<b>Week 1</b>	Position evaluation questionnaire distributed to City employees	Austin Peters Group/ University City	Questionnaires are delivered electronically. Position evaluation questionnaires are filled out by all employees and returned to their supervisors by day 10. Position evaluation questionnaires are distributed with a memo outlining the project.
<b>Week 3</b>	Market survey commences	Austin Peters Group	Market analysis (respondents will have 14 days to return survey to APG).
<b>Week 3</b>	Employee Q & A	Austin Peters Group	Employee sessions are held for questions and answers during the onsite process.

<b>Week 3</b>	Department/ supervisor/ employee Interviews	Austin Peters Group	Employees are interviewed for internal equity purpose and job description confirmation purposes. Work site tours.
<b>Week 10</b>	Department head/Human Resource Manager	Austin Peters Group	Draft of internal equity.
<b>Week 12</b>	Human Resource Manager/ department head	Austin Peters Group	Draft of findings with preliminary range recommendations and financial impact.
<b>Week 22</b>	Human Resource Manager	Austin Peters Group	Draft of findings with preliminary recommendations. Draft of FLSA report. Delivery of Job Descriptions.
<b>Week 26</b>	Meet with governing body	Austin Peters Group	Final recommendations.
<b>Week 26</b>	Guidebook and training Employee meetings	Austin Peters Group	Convey final documents. Provide workbook for implementation to Human Resources.
<b>Week 26</b>	Memo to City Administrator on any changes	Austin Peters Group	Convey final memo to City Administrator on any changes.

## 7) Conflicts of Interest Disclosure

Our firm and employees do not have any conflict of interest with the City or employees.

# 8) Fee Proposal

Scope and Cost	Cost
<b>Compensation and Classification/Job Descriptions (estimate of job classification positions) 260 positions</b>	
1. Conduct interviews with department heads, administration, managers and employees by position, site tours (30 minutes per position) (130 hours)	\$15,600
2. Compare current job classification to work being assigned and evaluate for internal equity (60 minutes per position) (260 hours)	\$31,200
3. External equity - market analysis of peers for 50 positions (flat rate)	\$7,500
4. Recommendations for market, ranges, alternatives with fiscal impacts, flexibility of structure, pay compression, implementation by position (80 hours)	\$9,600
5. Policy considerations including pay practices (10 hours)	\$900
6. System presentation to department heads, management team, training of staff for maintenance, final meeting with governing body (30 hours)	\$3,600
7. Review and rewrite job descriptions and provide feedback, comments, corrections, suggestions, electronically to original electronic copy (90 minutes per position)	\$46,800
8. Determine FLSA (fair labor standards act) classification (Estimate review of 60 positions) (20 hours)	\$2,400
9. Electronic copies will be sent to client for photocopying	No Charge
10. Travel costs (mileage) 3 Trips billed separately	
<b>Total Project Cost (not to exceed)</b>	<b>\$117,600</b>

## Additional Work

The rate for this project is \$120/hour. This hourly rate will be applied for any additional services beyond the scope of services outlined in this request for proposal response.

# 9) Payment Schedule for Professional Fees

APG will bill the City in four invoices completed in a progressive manner with a deposit at the start of the project.

# 10) Proposed Contract between City and Consultant



**Letter of Understanding**

**LETTER OF UNDERSTANDING**

City of XYZ, Texas  
100 W. Wilco St.  
XYZ, Texas 78677  
Phone: (512) 528-2700

Project beginning January 8, 2018 and projection completion May 28, 2018.

This letter shall serve as a letter of agreement between the City of XYZ, Texas and and The Austin Peters Group, Inc., of Overland Park, Kansas, governing the provision of professional human resource consulting for the City of XYZ, Texas.

The City of XYZ, Texas agrees to compensate the Austin Peters Group, Inc. up to \$27,900.00 for a compensation plan update and certification pay study and policy outlined in the proposal dated November 3, 2017. The City of XYZ, Texas agrees to compensate The Austin Peters Group, Inc., under the terms and conditions as provided herein according to the Scope and Cost below.

<b>Scope and Cost</b>	<b>Cost</b>

**Additional Work**

The rate for this project is \$120/hour. This hourly rate will be applied for additional services.

The City of XYZ, Texas agrees to provide a total payment of XXXXXX divided into four payments in the amount of \$XXXXXX to be billed in a progressive manner with a deposit and final payment. The final invoice will be adjusted with actual travel expenses included.

With regard to the services to be performed by The Austin Peters Group, Inc., pursuant to the terms of the agreement, The Austin Peters Group, Inc., shall not be liable to the City of XYZ, Texas or to anyone who may claim any right due to his relationship with City of XYZ, Texas for any acts or omissions in the performance of said services on the part of The Austin Peters Group, Inc., or on the part of the agents or employees of The Austin Peters Group, Inc.; except when said acts or omissions of The Austin Peters Group, Inc., are due to their willful misconduct.

City of XYZ, Texas shall hold The Austin Peters Group, Inc., free and harmless from any obligations, costs, claims, judgments, attorneys' fees and attachments arising from or growing out of the services

rendered to City of XYZ, Texas pursuant to the terms of this agreement or in any way connected with the rendering of said services, except when the same shall arise due to the willful misconduct as determined by a court of competent jurisdiction.

City of XYZ, Texas, agrees that the liability of Austin Peters Group, Inc., its officers, agents, employees, and contractors, regardless of the legal theory under which such liability is imposed, shall not exceed the total fee paid to Austin Peters Group for the particular project or services, or other associated services that gave rise to the claim being asserted by City of XYZ, Texas. In no event shall Austin Peters Group, Inc, its officers, agents, employees and contractors, be liable for any special, incidental or consequential damages.

If any provision of this agreement is deemed to be invalid or inoperative for any reason, that part shall be deemed modified to the extent necessary to make it valid and operative, or if it cannot be so modified, then severed, and the remainder of the Agreement shall continue in full force and effect as if the agreement had been signed with the invalid portion so modified or eliminated.

If the terms of this agreement meet with your approval, please indicate the same below by your signature and a return copy (both pages of this section "LETTER OF UNDERSTANDING...") for my files. Returning via fax is acceptable (913-851-7529) or scan to email [etatarko@austinpeters.com](mailto:etatarko@austinpeters.com).

Accepted by: \_\_\_\_\_  
City of XYZ, Texas Representative

Date: \_\_\_\_\_

# Miscellaneous

- The Austin Peters Group, Inc. uses a subcontractor to edit documents
- Survey information may be obtained from the following sources in addition to a customized survey – Bureau of Labor Statistics, Economic Research Institute
- Sample final report

## *Products and Services*

### **Management Recruitment and Development**

Executive and managerial recruitment and selection

Team building

Strategic planning

Performance evaluation

Human resource management

Organizational climate surveys

Program evaluation

Facilitation

### **Compensation and Benefits**

Compensation and benefit studies and solutions

Job evaluation

Market analysis

### **General Employment**

Compliance with federal employment law

Employee handbooks

Job descriptions

Employment mediation

Third-party investigation

Sexual harassment training

Interviewing techniques

Conducting background checks

## **Leadership Development**

- Achieve global products
- Myers Briggs Type Indicator
- Communication styles
- Conflict resolution
- Supervisory training
- Employee development planning

## **Affirmative Action Planning**

- Affirmative action planning
- Compensation analysis
- Equal opportunity surveys
- Quarterly management reports
- Recruitment and placement support
- Diversity and sensitivity training

## ***Sample of Clients***

A partial list of past clients includes:

- American Italian Pasta Company, Kansas City, Missouri
- Bartlett and West Engineers, Inc., Topeka, Kansas
- Butler County, Kansas
- City of Abilene, Kansas
- City of Bonner Springs, Kansas
- City of Chattanooga, Tennessee
- City of Clinton, Iowa
- City of Columbia, Tennessee
- City of Iowa City, Iowa
- City of La Vista, Nebraska
- City of Leander, Texas
- City of Manhattan, Kansas
- City of Marshalltown, Iowa
- City of Morristown, Tennessee
- City of Newton, Kansas

City of North Liberty, Iowa  
City of Ottawa, Kansas  
City of Montrose, Kansas  
City of Pleasanton, Missouri  
Clay County, Kansas  
Continental Disc, Kansas City, Missouri  
Country Club Bank, Kansas City, Missouri  
Ellerbe Becket, Inc., Minneapolis, Minnesota  
E-ONE, Ocala, Florida  
Federal Signal Corporation, Oak Brook, Illinois  
First Citizens National Bank, Dyersburg, Tennessee  
Franklin County, Kansas  
Ford County, Kansas  
Geary County, Kansas  
Goodwill Industries of North Georgia, Atlanta, Georgia  
Grant County, Kansas  
Harvey County, Kansas  
Hiller Group, Inc., Princeton, New Jersey  
HOK Group, Inc., St. Louis, Missouri  
Hood Packaging Corporation, Madison, Mississippi  
Johnson County, Kansas  
Kansas Health Foundation, Wichita, Kansas  
Kansas Legal Services, Topeka, Kansas  
Kansas State University, Manhattan, Kansas  
Kearny County, Kansas  
Labat-Anderson, Inc., McLean, Virginia  
LeCroy Corporation, Chestnut Ridge, New York  
Mid America Regional Council, Kansas City, Missouri  
MFRI, Inc., Niles, IL  
National Institute of Health (NIH), Bethesda, Maryland  
Perkins + Will of New York, New York  
Perma-Pipe, Lebanon, Tennessee  
Platte Valley Bank, Platte City, Missouri  
Polyengineering, Dothan, Alabama  
Pottawatomie County, Kansas  
Rice County, Kansas

Riley County, Kansas  
River Valley Behavioral Health, Owensboro, Kentucky  
Sedgwick County, Kansas  
Siegel-Robert, Inc., St. Louis, Missouri  
Southern Missouri State University, Harrisonville, Missouri  
Sprint Corporation, Overland Park, Kansas  
TIG HITCO, Atlanta, Georgia  
UniGroup Worldwide, St. Louis, Missouri  
University of Central Missouri, Warrensburg, Missouri  
University of New Mexico at Roswell  
United States Department of Agriculture, Manhattan, Kansas  
United Way, Kansas City, Missouri  
United States Department of Education, Washington, D.C.  
Wells Fargo, Elkhart, Indiana  
Zephyr Products, Inc. Leavenworth, Kansas



## Council Agenda Item Cover

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**MEETING DATE:** May 29, 2018

**AGENDA ITEM TITLE:** Great Rivers Greenway Delmar-I170/McKnight Intersection Improvements – Approvals

**AGENDA SECTION:** Consent Agenda

**CAN THIS ITEM BE RESCHEDULED?:** YES

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**BACKGROUND:** Great Rivers Greenway has proposed an enhanced crossing layout at the intersection of Delmar Blvd. with I170 and McKnight Rd. A layout of this project is attached.

The improvements include a safer and more comfortable pedestrian and bicycle crossing experience while maintaining or enhancing the traffic operations at the intersection. The components of the project include replacement of curb and concrete sidewalk/median sections, roadway shoulder, high visibility pedestrian crosswalk markings (white blocks) and dedicated bicycle crossing markings (green pavement paint). The intersection at the location is under Missouri Department of Transportation's (MoDOT) maintenance.

The attached maintenance agreement outlines a division of responsibilities for the project improvements. The pavement markings for the project are listed under the City of University City's maintenance responsibility. MoDOT has indicated that the agency doesn't maintain the type of enhanced pavement markings proposed for the project. The original agreement that University City has signed with Great Rivers Greenway for the maintenance of the Centennial Greenway along I170 assigns its maintenance responsibility to the City except for the portions maintained by other agencies. A copy of this agreement is also attached for review.

Also attached is a request letter to the Federal Highway Administration (FHWA) for an interim approval of the painted (green) bicycle lane pavement markings usage at the project location. As indicated above, these pavement markings are proposed to be under the City of University City's maintenance. Once a permanent approval is given for the bicycle lane-crossing pavement markings, then the interim approval won't anymore be applicable. The City, under this approval, can also implement these bicycle lane and crossing markings at other locations of conflict between the bicycle and motorized traffic, as warranted.

All project improvements are proposed to be installed initially by the Great Rivers Greenway at no cost to the City. The increased maintenance cost of the improvements to the City is minimal and the maintenance work is a part of the routine capabilities of the City's Street Division. If successful, other examples of this type of pavement markings will be applicable at other conflict zones on the roadway network in University City providing for safer and more visible crossings where needed.

The Traffic Commission has reviewed the project information at their regular meeting in July 2017.

**RECOMMENDATION:** City Council to approve authority to the City Manager to sign and enter into a maintenance agreement and request for interim approval for the project, as referenced.

**ATTACHMENTS:**

- 1) Project Layout
- 2) Original GRG Centennial Greenway Agreement
- 3) Maintenance agreement and request for interim approval









**COOPERATION AGREEMENT FOR THE  
CONSTRUCTION AND MAINTENANCE OF THE CENTENNIAL GREENWAY**

This AGREEMENT is made and entered into this 22nd day of April, 2010 by and between Metropolitan Park and Recreation District, d/b/a The Great Rivers Greenway District ("GRG") and the City of University City ("U. City") and the City of Olivette ("Olivette").

**WHEREAS**, Section 67.1709 RSMo authorizes GRG to "contract with other parks and recreation systems" within its boundaries, and U.City and Olivette own and maintain such park systems; and,

**WHEREAS**, representatives of the U. City and Olivette and members of the U. City and Olivette staff have served as Technical Advisory Committee members for the Centennial Greenway planning process; and,

**WHEREAS**, the Centennial Greenway project advances the long-range goal of a continuous trail connecting Forest Park to Creve Coeur Park, and the short-range SEED project of a trail along the abandoned railroad corridor owned by Metro that runs parallel to Interstate 170 from Shaw Park in the City of Clayton north through the City of Ladue, continuing north through the City of University City and continuing north to Olive Blvd in the City of Olivette; and

**WHEREAS**, GRG, U. City and Olivette recognize that approximately 1,100 linear feet of the facility will be located partially in both Cities as this segment of the planned facility is split by the municipal boundary of both Cities; and

**WHEREAS**, U. City and Olivette have determined that the proposed trails are consistent with the relevant plans of U. City and Olivette; and,

**WHEREAS, GRG has adopted the Regional Greenway Plan and has determined that the proposed trails are consistent with its mission and will be a major benefit to the residents of Olivette and University City and the St. Louis region.**

**NOW THEREFORE, the parties hereto agree as follows:**

**1. GRG Obligations. GRG agrees to engineer and construct a trail, at GRG's cost, along the abandoned railroad corridor owned by Metro that runs parallel to Interstate 170 from Shaw Park in the City of Clayton north through the City of Ladue, continuing north through the City of University City and continuing north to Olive Blvd in the City of Olivette.**

**2. U. City Obligations. After construction by GRG, U. City:**

**(a) shall assume the full and total financial and administrative responsibility for ordinary operations and maintenance of that portion of the trail beginning at the city limit with Ladue and going north to Olive Blvd.(the "U. City Section") to allow safe and convenient public access, enjoyment, and use, and**

**(b) shall be responsible for any capital improvements, as reasonably needed or desired and as may be approved by the University City Council, on that portion of the U. City Section that lies south of the existing arch drainage structure identified on the attached exhibit, which is approximately 1,100 linear feet south of Olive Blvd.**

**It is understood and agreed that U. City may close the U. City Section when U. City deems it necessary for normal maintenance activities or for public safety.**

3. Olivette Obligations.

(a.) After construction by GRG, Olivette shall be responsible for any capital improvements, as reasonably needed or desired and as may be approved by the Olivette City Council, on that portion of the U. City section that lies north of the existing arch drainage structure identified on the attached exhibit, which is approximately 1,100 linear feet south of Olive Blvd.

(b.) If the Metrolink light rail system is extended in the area after construction of the trail, Olivette shall not be obligated for any trail relocation expenses.

4. Time of Completion. The intention of GRG is to complete the project described in this Agreement by December 1, 2010. If GRG is unable to complete the project by December 1, 2010, GRG shall begin on that date submitting monthly written progress reports to Olivette & U. City.

5. Publicity. Olivette and U. City agree to include in any press releases or other publicity about the projects described in this COOPERATION AGREEMENT the words "Funding for this project was provided by the Great Rivers Greenway District."

**WHEREFORE**, the parties have set their hands the day and date first above written.


CITY OF UNIVERSITY CITY

By:   
City Manager

GREAT RIVERS  
GREENWAY DISTRICT

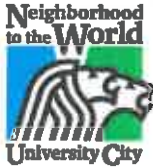
By:   
Executive Director

CITY OF OLIVETTE

By:   
City Manager

Approved By the  
Olivette City Council  
On March 23, 2010





## Council Agenda Item Cover

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**MEETING DATE:** May 29, 2018  
**AGENDA ITEM TITLE:** Organizational Structure  
**AGENDA SECTION:** City Managers Report  
**CAN THIS ITEM BE RESCHEDULED? :** Yes

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### **BACKGROUND REVIEW:**

This item asks the Mayor and Council to approve the proposed organizational restructuring. The restructuring is being proposed to better position us to achieve our strategic objectives. As proposed the restructuring would have a minimal impact on the Police Department, Fire Department, City Attorney's Office, and the Courts. The restructured organization asks for greater resources in the areas of economic development, communications, parks, recreation, and forestry. The attached highlights the proposed changes.

### **RECOMMENDATION:**

The City Manager recommends approval of the proposed organization chart and authorization to move forward with its implementation.

### **ATTACHMENTS:**

- Staff Report
- Organizational Chart





## STAFF REPORT:

This item asks the Mayor and Council to approve the proposed organizational restructuring. The restructuring is being proposed to better position us to achieve our strategic objectives. As proposed the restructuring would have a minimal impact on the Police Department, Fire Department, City Attorney's Office, and the Courts. The restructured organization ask for greater resources in the areas of economic development, communications, parks, recreation, and forestry. The following highlights the proposed changes:

### ASSISTANT TO THE CITY MANAGER – ECONOMIC DEVELOPMENT:

The proposed structure would create a director level Assistant to the City Manager – Economic Development position. This would result in the elimination of the Deputy Director of Economic Development and Community Development and the Manager of Economic Development positions. Funding for the new position would be taken from the Economic Development Retail Sales Tax Fund, as was the position recommended for elimination. The attachment list the duties and responsibilities for the new position (see attachment.)

### ASSISTANT TO THE CITY MANAGER – COMMUNICATIONS:

The proposed director level Assistant to the City Manager – Communications position would be responsible for coordinating all public information efforts. This position would also have oversight of information technology, and customer service, and would staff CALOP. The attached highlights all areas of responsibility for the position. The Assistant to the City Manager - Communications would be budgeted in General Fund.

### FIRE DEPARTMENT:

Since first presenting this matter to you, I have reassigned the Fire Marshall duties to the Fire Department. These duties are currently being absorbed by the Fire Department without additional resources.

### FINANCE DEPARTMENT:

The Finance Department is proposed to reduce its span of control as I believe it is too great. The Department would have a more traditional role focusing on the areas identified in the attached proposed organization chart. Courts, Information Technology, and Human Resources divisions which currently reside in the Finance Department, would be removed and placed under the City Manager or Assistant to the City Manager position.

### HUMAN RESOURECES DEPARTMENT:

I am proposing to reinstate the Human Resources Department (HR), and to hire a human resources director to oversee the functions. The current Human Resources area does not have the capacity to address the current needs of the organization. H.R. would oversee functions such as labor relations, wellness, risk management, safety, and career development just to name a few. The areas of responsibility for the Department are fully outlined in the attached proposed organization chart.

### PARKS, RECREATION AND FORESTRY DEPARTMENT:

I am proposing to reinstate the Parks, Recreation and Forestry Department and hire a director to oversee it. Although these duties are currently separated, there is a nexus between the parks and recreation duties. For example, the parks division maintain the pool and assists with

building improvement projects. The pruning of the park tree and golf course trees could be accomplished by the forestry division. I believe a greater focus needs to be given to Centennial Commons and the Golf Course to increase revenues in these areas. The attached proposed organization chart outlines all the functions for this department.

**PUBLIC WORKS DEPARTMENT:**

I am proposing to remove the Parks, Forestry, and the Golf Course divisions from Public Works and add the Facilities division from Community Development. Aforementioned is my reasons for creating a Parks, Recreation, and Forestry Department. On the matter of Facilities, the area seems better suited for Public Works as we start to invest more in our facilities; which will result in significantly more construction projects.

**PLANNING AND ZONING DEPARTMENT:**

I am proposing a name change for the Community Development Department to Planning and Development, and a reduction in span of control. The new name is more representative of the role the department is proposed to have in the organization. The removal of economic development, Fire Marshall duties, and the Facilities divisions will result in this being able to focus more efforts on long-range planning objectives. In addition, greater focus will be placed on code enforcement in an effort to reduce housing dilapidation.

**Organizational Structure Proposal  
City of University City**

**City Manager's Office**  
*Intergovernmental Affairs*

**Assistant to City Manager**  
*Economic Development*

Business Recruitment  
Business Retention/Expansion  
LSBD Liaison Staff  
Development Ombudsman  
CIP Coordination Marketing  
Coordinate Development Group Meetings Agenda  
IDA Staff  
LCRA Staff  
ED Sales Tax Board Staff  
TIF Board Staff  
(S) Parking Garage Operator  
(S) Neighborhood Services

**Assistant to City Manager**  
*Communication*

PIO  
Newsletter  
Web Page  
Video Production  
Special Projects  
Coordinate Management Team Agenda  
Risk Management Team  
(S) City Manager Secretary  
Multi Media /Social Coordinator  
(S) Customer Service  
(S) Information Technology (I.T.)  
City Manager Budget  
Calendar Oversight  
CALOP Comm.

**Fire Department**  
Fire Marshall

**Police Department**

**Finance Department**  
Accounting  
Purchasing  
Staff Pension Board  
Budget

**Human Resources**  
Employee Recruitment  
Employee Benefits  
Labor Relations  
Wellness Program  
Class & Comp Review  
Risk Management  
Safety Team Lead  
Training  
Staff Civil Service Board  
Staff Human Relations Committee  
Employee Evaluation  
Career Development

**Parks and Recreation**  
Park Maintenance  
Recreation  
Forestry  
Events  
Senior Programs  
Staff Arts & Letters  
Staff Park Commission  
Staff Senior Commission  
Staff Urban Forestry Commission  
Golf Course

**Public Works**  
Street Maintenance  
Sanitation  
Engineering  
Fleet Operations  
Facilities  
Storm Water Management  
Staff Traffic Commission  
Staff Green Practice Commission

**Planning and Development**  
P & Z Inspections  
Permitting Staff  
P & Z Commission  
Staff BOA  
Staff LCRA  
Historic Preservation Commission  
Staff Appeals Board  
Staff Infill Review Board  
Code Enforcement

**City Attorney**

**Judge**  
Court Clerk  
Prosecutor  
Assistant to Prosecutor

