



Personnel Committee

9:00 a. m., Tuesday, November 12, 2020
1207 Palm Boulevard
Isle of Palms, South Carolina

Virtual Meeting Due to COVID-19 Pandemic:

The public may join the virtual meeting by clicking here: <https://www.youtube.com/user/cityofisleofpalms>

Public Comment:

All citizens who wish to speak during the meeting must email their first and last name, address and topic to rhanna@iop.net no later than 3:00 p.m. the day before the meeting. Citizens who sign up to speak will receive an email with instructions to join the meeting via Zoom. All verbal comments will have a time limit of three (3) minutes. Speakers must turn on their video and make sure that their actual name shows up as their Zoom identifier, and mute themselves after their comments.

Citizens may provide public comment here:
<https://www.iop.net/public-comment-form>

Agenda

1. **Call to order** - and acknowledgement that the press and public have been duly notified of the meeting in accordance with the Freedom of Information Act.
2. **Approval of previous meeting's minutes** – October 8, 2020
3. **Citizens' Comments**
4. **Old Business**
 - a. Discussion and consideration of proposals received for RFP 2020-07 Wage and Compensation Analysis
 - b. Update on Fire Chief hiring process
5. **New Business**

Consideration of applications for appointments to Boards and Commissions
6. **Miscellaneous Business**

Next Meeting Date: 9:00 a.m., Tuesday, _____, 2020
7. **Executive Session** – If needed
8. **Adjournment**



Personnel Committee
9:00am, Thursday, October 8, 2020
Virtual Meeting via Zoom call due to COVID-19 Pandemic
broadcasted live on YouTube: <https://www.youtube.com/user/cityofisleofpalms>

MINUTES

1. Call to Order

Present: Council Members Moye and Streetman, Mayor Carroll

Staff Present: Administrator Fragoso, Asst. Administrator Hanna

2. Approval of previous meeting's minutes – September 15, 2020

Mayor Carroll made a motion to approve the minutes September 15 meeting, and Council Member Streetman seconded the motion. The minutes passed unanimously.

3. Citizen's Comments – none

4. Old Business

A. Update on Wage and Compensation Study

Administrator Fragoso said they are working on the RFP for the study with a goal of receiving applications by November 6. She suggested delaying the November meeting of the Committee by a week so they will have time to review the applications and make a recommendation to the Ways & Means Committee.

B. Update on hiring for HR/Payroll Officer

Administrator Fragoso reported that the hiring of the HR/Payroll Officer is an ongoing process. They are still reviewing applications and have left the application process open until the position is filled. She noted that prior to the creation of the position department heads were completing the hiring process.

5. New Business

A. Hiring Process for New Fire Chief

Chief Graham has submitted her resignation effective December 31, 2020. Administrator Fragoso shared a proposed timeline for filling that position and the Committee discussed its feasibility. Advertising for the position will begin October 16. Both the Personnel and Public Safety committees will be involved in the hiring process. Administrator Fragoso said she would share the hiring timeline with the full City Council.

6. Miscellaneous Business

Council Member Moye asked for an update on the Strategic Planning Process. Administrator Fragoso said the department heads will meet for a (socially-distanced) workshop at the Riley Center on October 22. The City Council will meet for a similar workshop following soon after.

Mayor Carroll thanked staff for all their hard work as of late.

The next meeting of the Personnel Committee will be on Thursday, November 12, 2020 at 9am.

7. Adjournment

Mayor Carroll made a motion to adjourn, and Council Member Streetman seconded the motion. The motion passed unanimously. The meeting was adjourned at 9:59am.

Respectfully submitted,

Nicole DeNeane
City Clerk

**City of Isle of Palms, South Carolina
Official Sealed Proposal Opening**

**RFP 2020-07 Wage and Compensation Analysis
3:00 p.m., Friday, November 6, 2020
Council Chambers in City Hall
1207 Palm Boulevard, Isle of Palms**

Present: Desirée Fragoso, City Administrator

City Administrator Fragoso announced the sealed bid opening of RFP 2020-07 Wage and Compensation Analysis and stated that it was advertised in accordance with the City's Procurement Code.

Proposals submitted prior to the deadline:

1. Paypoint HR, LLC

Location: Primary Office: Davidsonville, Maryland. Local Office: Mount Pleasant, South Carolina

Fee Proposal: \$20,000 plus travel expenses billed at cost

2. HR Bridging

Location: Easley, South Carolina

Fee Proposal: \$14,000

3. Baker Tilly LLC

Location: St. Paul, Minnesota

Fee Proposal: \$ 16,575, plus \$3,000 for out-of-pocket expenses

4. Evergreen Solutions

Location: Tallahassee, Florida

Fee Proposal: \$21,000, inclusive of travel expenses

5. Condrey and Associates, Inc.

Location: Athens, Georgia

Fee Proposal: \$29,500, plus \$12,500 for benefits study

6. Archer Company, LLC

Location: Rock Hill, South Carolina

Fee Proposal: \$14,500

The proposals will be presented to the Personnel Committee for consideration at their regular meeting November 12, 2020.



**Response to the City of Isle of Palms, SC
RFP 2020-07 for a Wage & Compensation Analysis
November 6, 2020**

Project Contact: Karin Campbell, CEO
(443) 336-4272
Karin@PaypointHR.com

Primary Office (5) Staff
695 Santa Maria Lane
Davidsonville, MD 21035

Local Office (1) Staff
3549 Henrietta Hartford Rd
Mount Pleasant, SC 29466

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Transmittal Letter

November 2, 2020

City of Isle of Palms
Desirée Fragoso
City Administrator
1207 Palm Boulevard
Post Office Box 508
Isle of Palms, South Carolina 29451

Subject: Transmittal Letter

Dear Ms. Fragoso:

Paypoint HR, LLC is pleased to present our response to the City of Isle of Palms, South Carolina's RFP 2020-07 for a Wage and Compensation Analysis. Paypoint HR has the staff and experience to serve the City and to fulfill all requirements in the RFP within the established time period of under six months and is committed to the successful outcome of the project. Our area of expertise is in classification and compensation studies, specifically designed for the public sector. We have been providing these services to cities like Isle of Palms since 2012.

We plan to help the City develop a pay philosophy that supports the City's initiative to be understood for its unique qualities. We plan to incorporate solutions that consider the City's high cost of living as well as the community's demand for quality services. Our time-tested methodology will incorporate a comprehensive job analysis of all positions to establish a fair and equitable compensation relationships across the entire organization. We plan to conduct an external market study analysis for the 39 positions listed in the RFP and work with the project team to identify appropriate comparator organizations that capture the true nature of the work conducted as well as the complexity of market conditions. We will maintain compliance with federal and state laws. Excellence, fairness, clarity, and transparency will be the guiding principles we will utilize in developing recommendations to the compensation system that will attract and retain highly qualified employees. We feel that our experience, technology, customer service, commitment to quality, employee outreach and defensible data make us uniquely qualified to fulfill the prescribed scope of work for this important project.


As an authorized signatory and 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, IPMA-SCP
Paypoint HR, LLC
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 120 days after the proposal due date. We look forward to working with the City on this important project.

Sincerely,



Karin VM Campbell
CEO

Qualifications

Prior Experience – Case Studies

Stuart, Florida – Classification and Compensation Study

Paypoint HR conducted a classification and compensation study for the city of Stuart, Florida. The study included approximately 275 employees within roughly 122 distinct positions. At the conclusion of the study, Paypoint HR established salary placement procedures, policies, and salary structure to allow appropriate ongoing compensation administration.

Paypoint HR also provided updates to 122 job descriptions. Job descriptions were updated and standardized using PVP responses from employees and managers. Additionally, Paypoint HR conducted a benefits review.

Stuart faced the challenge of losing trained staff to higher paying municipalities closer to the South Florida region.

Fort Walton Beach, Florida – Pay & Classification Study

Paypoint HR conducted a compensation philosophy and study for the city of Fort Walton Beach, Florida, reviewed and updated the classification and compensation plans for the city's employees. The study included approximately 297 full and part-time employees. Additionally, there were approximately 120 job classifications. The study ensured that an equitable compensation system was in place which compensated employees fairly in terms of external comparisons and reflected responsible public expenditure and policy.

Additionally, Paypoint HR updated and standardized 117 job descriptions as well as performing a benefits review.

Fort Walton Beach faced the challenge of pay compression, especially with regard to police.

Garrett College, Maryland – Job Classification and Compensation Study

Garrett College employed Paypoint HR to complete a job classification and compensation study involving 21 full-time faculty, 63 administrative employees, and 58 staff employees classified within 98 unique positions on a single pay plan. The purpose of the study was to help the college be recognized as an employer of choice in the area by providing a viable cost effective and competitive pay structure. The study measured and provided analysis on salary and benefits provided at the other 15 Maryland community colleges, local universities and private sector employers. Furthermore, the study included constructing an

analytical placement policy for new hires which would consider education level, certifications and promotion potential.

While Garrett College was challenged with low enrollment levels, both the college and Paypoint HR were challenged with an expansion of the project to include a college-wide staffing level review including reductions, outsourcing, restructuring, and the creation of new positions.

City of Nixa, Missouri – Employee Compensation, Benefits and Classification Study

Paypoint HR presented the city of Nixa, Missouri with an employee compensation, benefits and classification study after a comprehensive review and update of the classification and compensation plan for the city's employees. The purpose of the study was to provide the leadership team and City Council with a process for ascertaining equitable value of positions on a competitive salary scale. The study included approximately 137 full-time employees within roughly 98 distinct positions. The study recommendations indicated what actions should be taken to avoid loss of qualified staff and addressed difficulties in recruiting new employees for Nixa. In addition, the study recommended adjustments to Nixa's salary placement procedures, policies, and salary structure to allow appropriate ongoing compensation administration.

The study was divided into two parts: a classification phase and a compensation phase. The classification phase included identification, review, and analysis of specific work being performed in various positions. That data was then used to simplify positions and match them to the external market in an "apples to apples" comparison. The compensation phase consisted of an external market survey of local public and private sector organizations to determine what the local labor market pays for specific jobs.

Challenges faced while working with the city of Nixa included having to come up with a new strategic vision when offering salary recommendations for their employees due to limitations created by the city's rich benefit package. In addition, the city struggled with competition for electric workers with the local co-ops.

Lebanon, Missouri – Compensation Philosophy and Study

Paypoint HR completed a compensation philosophy and study for Lebanon, Missouri reviewed and updated the classification and compensation plans for the city's employees. The study included approximately 149 full-time and 30 seasonal employees. The study ensured that an equitable compensation system was in place which compensated employees fairly in terms of external comparisons and reflected responsible public expenditure and policy. In addition, Paypoint HR prepared a multi-year implementation plan for the city to continue the implementation of Paypoint HR's recommendations.

Additionally, Paypoint HR provided updates to 94 job descriptions. Job descriptions were updated and standardized using PVP responses from employees and managers.

City of Bethlehem, Pennsylvania – 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 had 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.

Rockingham County, Virginia – Employee Compensation and Classification

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.

Town of Front Royal, Virginia – Compensation and Classification Study

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.

Our Team

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.

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.

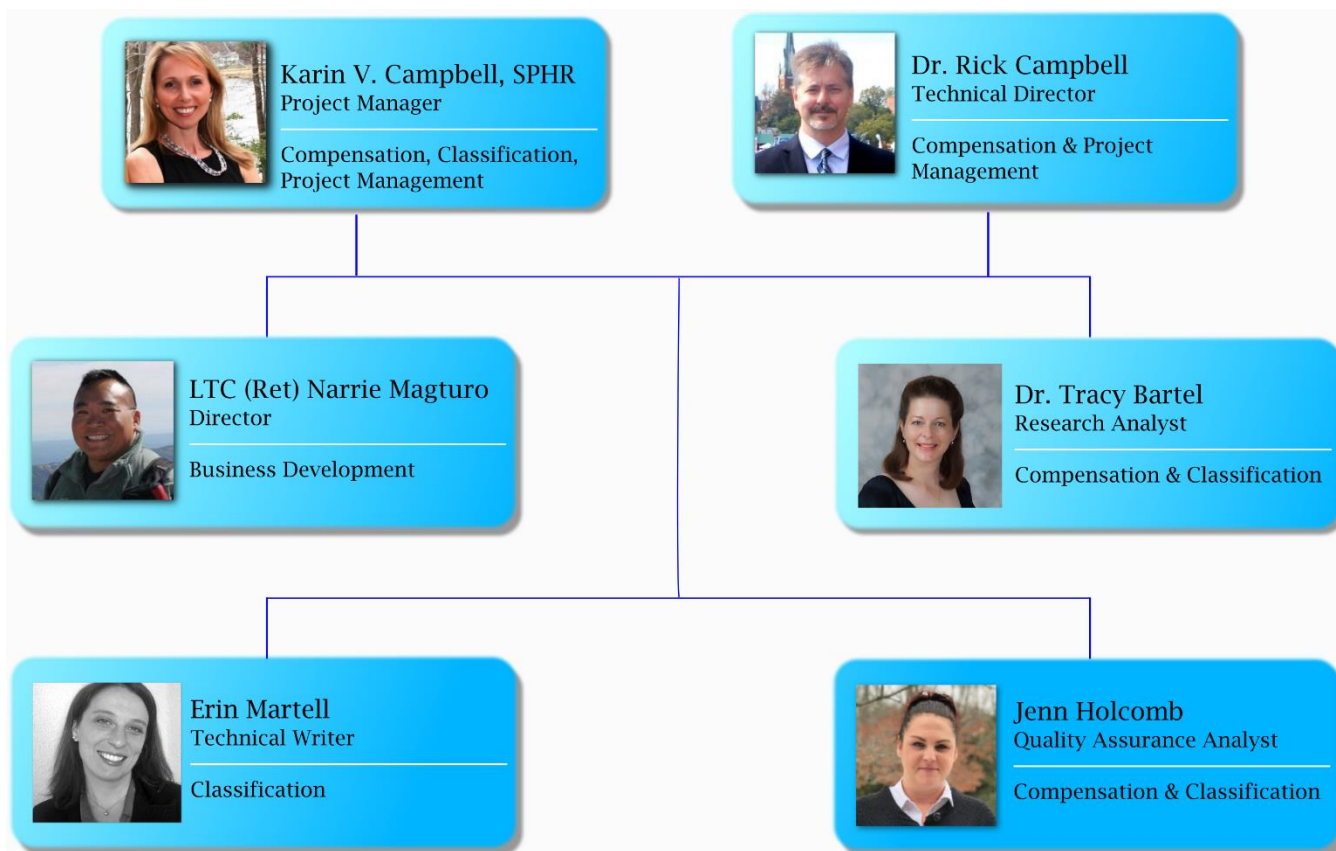


Figure 1 – Project Team Organization Chart

About Us

Paypoint HR has the following senior staff ready to be deployed for this project and has the resources to confidently provide the City with exceptional service. They are listed below:



Karin Campbell, SPHR, SHRM-SCP, IPMA-SCP

Bachelor of Science in Business Marketing, University of Maryland
MBA Studies University of Texas

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; and 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, SHRM-SCP, and IPMA-SCP designations and serves on the Board for the ASHRM chapter. Karin has a 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'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 maximize return. She has helped clients face challenges in gaining the financial commitment necessary to adopt and implement recommendations.

Karin has worked on the following recent projects:

City of Otero, NM	City of Marion, IA	City of Lake Dallas, TX
Easter Seals Midwest, MO	Grandview School District, MO	Raytown School District, MO
Prince George's County Memorial Library System, MD	Center School District, MO	Richmond Metropolitan Transportation Authority, VA
City of Columbia, MO	Independence School District, MO	The Family Conservancy, MO
City of Fort Walton Beach, FL	Kansas City Public Schools, MO	The YMCA of Greater Kansas City, MO
City of Glenpool, OK	Knox County, IL	Town of Front Royal, VA
City of Lebanon, MO	Mid America Regional Council, MO	Township of Shelby, MI
City of Milford, DE	Montessori Regional Charter School, PA	Village of Tinley Park, IL
City of Nixa, MO	Northampton County Public Schools, VA	Warren County Public Schools, VA
City of Radford, VA	Oklahoma City Zoo, OK	Warren County, VA
City of Red Wing, MN	Operation Breakthrough, MO	Durham Public Schools, NC
City of Waynesboro, VA	City of Bethlehem, PA	City of Dover, NH
Town of Farmville, VA	City of Elko, NV	City of South Portland, ME
City of Fort Walton Beach, FL	City of Stuart, FL	



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 7 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'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 multifaceted. 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 look 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.

Rick has worked on the following recent projects:

City of Otero, NM	City of Marion, IA	City of Lake Dallas, TX
Easter Seals Midwest, MO	Grandview School District, MO	Raytown School District, MO
Prince George's County Memorial Library System, MD	Center School District, MO	Richmond Metropolitan Transportation Authority, VA
City of Columbia, MO	Independence School District, MO	The Family Conservancy, MO
City of Fort Walton Beach, FL	Kansas City Public Schools, MO	The YMCA of Greater Kansas City, MO
City of Glenpool, OK	Knox County, IL	Town of Front Royal, VA
City of Lebanon, MO	Mid America Regional Council, MO	Township of Shelby, MI
City of Milford, DE	Montessori Regional Charter School, PA	Village of Tinley Park, IL
City of Nixa, MO	Northampton County Public Schools, VA	Warren County Public Schools, VA
City of Radford, VA	Oklahoma City Zoo, OK	Warren County, VA
City of Red Wing, MN	Operation Breakthrough, MO	Durham Public Schools, NC
City of Waynesboro, VA	City of Bethlehem, PA	City of Dover, NH
Town of Farmville, VA	City of Elko, NV	City of South Portland, ME
City of Fort Walton Beach, FL	City of Stuart, FL	

LTC (Ret) Narrie Magturo, Director

M.S Program Environmental Management. 2002-Present. (Webster University)
M.S Environmental Science, Soil Chemistry.1999-2001.(Purdue University)
B.A. Biology (Pre-Medicine). 1987-1991. (Capital University)
Certification. American Red Cross Disaster Response Team. 2000. (American Red Cross).

Narrie Magturo has 15 years of relevant experience. He has worked with Paypoint HR on the following projects over the last 3 years:

City of Otero, NM	City of Elko, NV	City of Lake Dallas, TX
City of Fort Walton Beach, FL	Kansas City Public Schools, MO	The YMCA of Greater Kansas City, MO
Town of Farmville, VA	City of Marion, IA	Town of Front Royal, VA
Warren County Public Schools, VA	Warren County, VA	Oklahoma City Zoo, OK
City of Waynesboro, VA	City of Dover, NH	City of South Portland, ME
City of Fort Walton Beach, FL	City of Stuart, FL	City of Largo, FL

Dr. Tracy Bartel

Ph.D., Life Span Human Development, Kansas State University
M.S. Early Childhood Education, Kansas State University
B.S., Psychology, Virginia Tech
B.S. Family Child Development, Virginia Tech

Certification: Current teaching certificate from the Commonwealth of Pennsylvania for Early Childhood Education (birth through 3rd grade) and a Pennsylvania Supervisory Certificate (Kindergarten thru 6th grade). She has also completed Induction with Pittsburgh Public Schools (PPS) as one of the requirements towards earning a Level II teaching certificate. In addition to her extensive education background, Tracy has worked with Paypoint HR for over 2 years.

Tracy has worked with Paypoint HR on the following projects:

City of Otero, NM	City of Elko, NV	City of Lake Dallas, TX
City of Fort Walton Beach, FL	Kansas City Public Schools, MO	The YMCA of Greater Kansas City, MO

Town of Farmville, VA	City of Marion, IA	Town of Front Royal, VA
Warren County Public Schools, VA	Warren County, VA	Oklahoma City Zoo, OK
City of Waynesboro, VA	City of Dover, NH	City of South Portland, ME
City of Fort Walton Beach, FL	City of Stuart, FL	City of Largo, FL

Erin Martell

Paralegal Certificate and Certificate of Distinction for academic excellence, American Institute for Paralegal Studies

MS, Criminal Justice, Criminal Justice Honor Society, Northeastern University

BA, Liberal Arts with Majors in Philosophy including metaphysics, ethics and political theory and History of Mathematics and Science and Minors in Classics and Comparative Literature, St. John's College

International Studies, Institute for Shipboard Studies at University of Pittsburgh

Erin has 12 years of experience in working with project teams. Studies she has worked with Paypoint HR include the following:

City of Otero, NM	City of Elko, NV	City of Lake Dallas, TX
Town of Farmville, VA	City of Marion, IA	Town of Front Royal, VA
City of Waynesboro, VA	City of Dover, NH	City of South Portland, ME
City of Fort Walton Beach, FL	City of Stuart, FL	City of Largo, FL
City of Claremont, NH	City of Cottage Grove, MN	

Jennifer Holcomb

Bachelor of Science in Health Sciences, San Diego State University

Associates Degree Nursing, Mira Costa College

Jenn has worked with Paypoint HR on numerous projects over the last 5 years. Some of her job responsibilities include the following:

- Review, analysis and update of job descriptions, and review of results from job analysis questionnaires to conduct job evaluations and assist in the creation of job family hierarchies within departments.
- 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.
- Work with members of the project team to coordinate activities that help reach study milestones.
- Design clear and concise reports that communicate complex concepts. She has reviewed findings to select support material that portrays an accurate picture of the evaluation of the study from baseline analysis through to final study deliverables.

City of Otero, NM	City of Elko, NV	City of Lake Dallas, TX
Prince George's County Memorial Library System, MD	Center School District, MO	Richmond Metropolitan Transportation Authority, VA
City of Columbia, MO	City of Fort Walton Beach, FL	City of Stuart, FL
City of Fort Walton Beach, FL	Durham Public Schools, NC	City of Lebanon, MO
City of Glenpool, OK	Knox County, IL	Town of Front Royal, VA
City of Milford, DE	Montessori Regional Charter School, PA	Village of Tinley Park, IL
City of Nixa, MO	Northampton County Public Schools, VA	Warren County Public Schools, VA
City of Radford, VA	Oklahoma City Zoo, OK	Warren County, VA
City of Waynesboro, VA	City of Bethlehem, PA	City of Dover, NH
Town of Farmville, VA	City of Marion, IA	City of South Portland, ME

Abilities & Approach

Paypoint HR, LLC (Consultant) is responding to the City of Isle of Palm's request for proposal (RFP) 2020-07 from qualified consultants to provide a Wage and Compensation Analysis. The purpose of the study is to help the City to satisfy its objectives to ensure fair and equitable compensation relationships within the organization, maintain pay equity compliance, ensure competitiveness with the external market, and enable easy maintenance by the City staff post implementation. We understand the fact that the City faces challenges in providing competitive pay and meeting the needs of a growing population with a tight housing market and high cost of living. Further, we understand this poses a challenge in creating a true reflection of market pay for the City's 6 departments consisting of General Government (Municipal Court, Finance & Human Resources), Recreation, Public Works, Building, Planning & Zoning, Police and Fire. Unique services and attractions to the City include access and services that support tourism and beach front accessibility, beach preservation, public safety to beach services, and marina services.

Paypoint HR has experience with high cost of living areas and will vet market comparators accordingly. We will objectively examine job roles and their placement in the City's hierarchy for the roughly 39 positions held by your 91 regular full-time employees, plus part-time and seasonal employees. We understand that in smaller organizations employees wear many hats and are able to make recommendations in accordance to job functionality. We will study the external market's pay ranges for the (39) prescribed positions, and give recommendations for adjustments as warranted by the findings. The study recommendations will be substantiated using quantitative evaluations, so the City may make informed decisions.

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. We are a full-service consulting firm with expertise in classification and compensation structure analysis and maintenance that incorporates market pay analysis. Ninety five percent of our work experience is in the public sector though we customize solutions based on the individual needs of each client.

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
695 Santa Maria Lane
Davidsonville, MD 21035
Karin@PaypointHR.com
(443) 336-4272

Technical Director – Secondary Contact

Dr. Rick Campbell
695 Santa Maria Lane
Davidsonville, MD 21035
Rick@PaypointHR.com
(540) 815-7837

Paypoint HR 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) and have been assisting the

public sector achieve their pay plan objectives since 2012. Our firm is located in Davidsonville, Maryland which is in close proximity to the United State Naval Academy in Annapolis, Maryland and Washington, DC.

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 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. We have helped develop compliant job descriptions and pay plans based on the most current regulations. Clients benefit from the compliance 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 incorporates the following:

- Market competitiveness;
- Recognition that compensation is comprised of more than just base pay levels;
- Consideration of changes in recent compensation trends and strategies;
- Customization of 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 we call Position Vantage Point (PVP), to conduct employee job analyses. This software helps update the job descriptions with the input from employees based on quantitative factors. Because employees help define their job duties and their results are saved in a separate secure file, it reduces the likelihood of grievances related to classification and also acts as a defense in the event of a dispute.

Once the recommendations are made for updates to classifications, job duties, and pay structures, the City will be given access to our custom designed tools for implementation and ongoing administration. We will create a Compensation Factor Scoring (CFS) system using information gathered during the study and allow the City online access to it going forward to help place positions in the future.

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 incorporates employee input on job classification and ensures the City will be seen as a great place to make a career as well as make a living.

Paypoint HR’s personnel bring several decades of experience of providing total compensation solutions to the public sector. 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 City. Paypoint HR has staff ready to be deployed for this project and has the resources to confidently provide the City with exceptional service.

We are members of WorlDatWork, International Public Management Association (IPMA), 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. Typical studies incorporate a custom external market survey. We also 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 the client’s input on 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 project goals.

Project Plan

Assessment of Needs

Paypoint HR has done a preliminary review of possible hurdles specific to the City's ability to attract, motivate, and retain employees. We understand a thorough Public Safety Workload Analysis was conducted in 2018. Furthermore, our project history has familiarized us with the local market and our public sector experience provides us a significant advantage.

Our understanding of the project is that the City of Isle of Palms is a full-service the City that provides both its residents and visitors with a full range of municipal services including but not limited to Government Services, Police, Fire; Building, Planning & Zoning Recreation, and Public Works. The City desires to update their current Classification and Compensation plan in order to keep up with current compensation practices. The purpose is to attract and retain a high performing and engaged workforce that will continue providing excellent service to those who live in the City and those that visit the City's many attractions.

We feel our methodology meets all of the criteria as prescribed under the "Scope of Work" including identification of goals with review of the City's mission statement as identified by the College of Charleston's The Riley Center for Livable Communities in its recommendations for developing a Strategic Plan for the City. Our methodology incorporates job analysis, a compensation study, market analysis, development of recommendations, alternate methods (to address internal inequities, compression, retention concerns, hard-to-fill positions, as well as market adjustments), and recommendations to compensation levels, range spread, and placement that incorporate options for different financial feasibility scenarios and implementation timelines.

We will review administrative policies, and make recommendations as appropriate. Our recommendations will be clear and we will offer implementation training and tools for ease of use and maintenance. We offer an information appeals process. We maintain objectivity and compliance with all federal, state, and local regulations.

Possible Challenges

Paypoint HR found the following issues as possible sources of challenges:

- High economic and population growth,
- Increase in community demands and expectations for service offerings paired with limited resources to quickly adapt,
- An outdated salary structure,
- Difficulty recruiting qualified individuals for certain positions such as Payroll and Human Resources Officer, Fire Chief, and Police officers,
- Job roles have changed due to changing technology, increased regulations, etc.,

- Increasing cost of employee benefits,
- Pay compression, external inequity, and perception of internal inequities, and
- A highly competitive labor market with other public and private employers in the metro region competing for the same labor force.

These obstacles are independently problematic and collectively require a change from a tactical management style to a strategic “big picture” 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 an appointed team leader, key leadership staff, and stakeholders (Project Team) to validate the scope of services, methodology, timeliness, and other deliverables. With COVID -19 restrictions, we are planning to hold meetings with video and teleconference meeting capabilities. Meetings will be held to kick-off the project, to conduct employee briefing sessions, focus groups, project status updates, and to present the final recommendations.

Statement of Methodology

Our methodology is comprehensive and encompasses all of the requirements specified in the RFP. Phase 1 focuses on the Classification/Internal Components. Phase 2 focuses on the Compensation/External Component. The standard methodology we will use to conduct both phases of the study is laid out in the flowchart and delineated below.

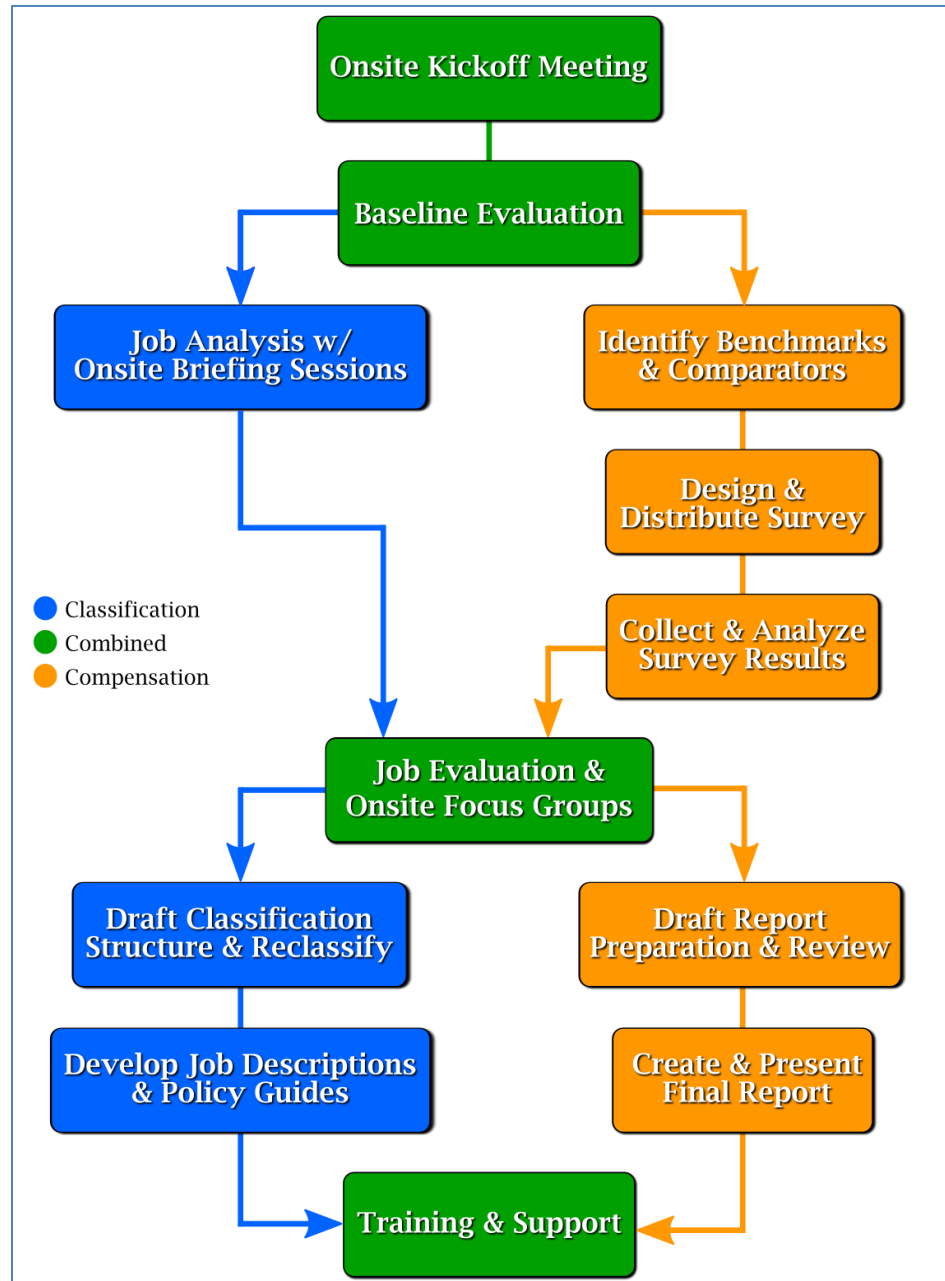


Figure 2 - Process Flow Chart

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:

- Job titles and job duties are, in the minds of the employees and their supervisors, inextricably associated with the “worth of the work” or pay. Compensation is often a highly emotional issue. By separating the two phases of the study, even though elements of the phases may be conducted concurrently, it gives us two separate yardsticks of measure.
- The compensation review will be completed when there is a full understanding of the scope of work, thereby ensuring that the data developed from the labor market and Client’s 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. This 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 1 – Classification/Competencies Component

- A. Project Start and Initial Meetings
- B. Baseline Data Collection and Initial Analysis
- C. Job Analysis Collection and Completion & Focus Groups
- D. Job Evaluation and Classification Development
- E. Draft Reports and Policy Guides
- F. Develop Guide for Implementation of Changes and Draft Interim Report

Phase 2 – Compensation Component

- A. Identify Benchmark Positions and External Survey Comparator List
- B. Design and Distribute Survey
- C. Collect and Analyze Survey Data
- D. Internal Relationship Analysis and Alignment
- E. Preparation of Draft Report
- F. Deliver Final Report and Deliverables for Implementation

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

Phase 1 Classification/Competencies Component

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, creation of custom survey websites for employees and managers, completion of Position Vantage Point by employees, desk audits by managers and/or Human Resources, and interviews with employees/focus groups. The cumulative information gathered will culminate in the preparation of revised or new class specifications, and a review process for all employees included in the scope of the study.

Task 1A – Project Start

The project initiation phase encompasses all the steps required to initiate the project. This task includes the following activities:

Kick-Off 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 Human Resources Director to discuss project context and methodology, determine reporting relationships, and clarify project understanding and Milestones to create the Communication Plan.
- Reach an agreement on a schedule for the project including all assignments and project milestones/deliverables and deadlines for completion of the assignment.
- Establish an agreeable communication schedule while identifying potential challenges and opportunities for the study.
- Schedule employee Kick-Off briefing sessions.
- Create an Executive Announcement Letter for distribution to staff.
- 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.
- 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.
- Maintain open lines of communication.

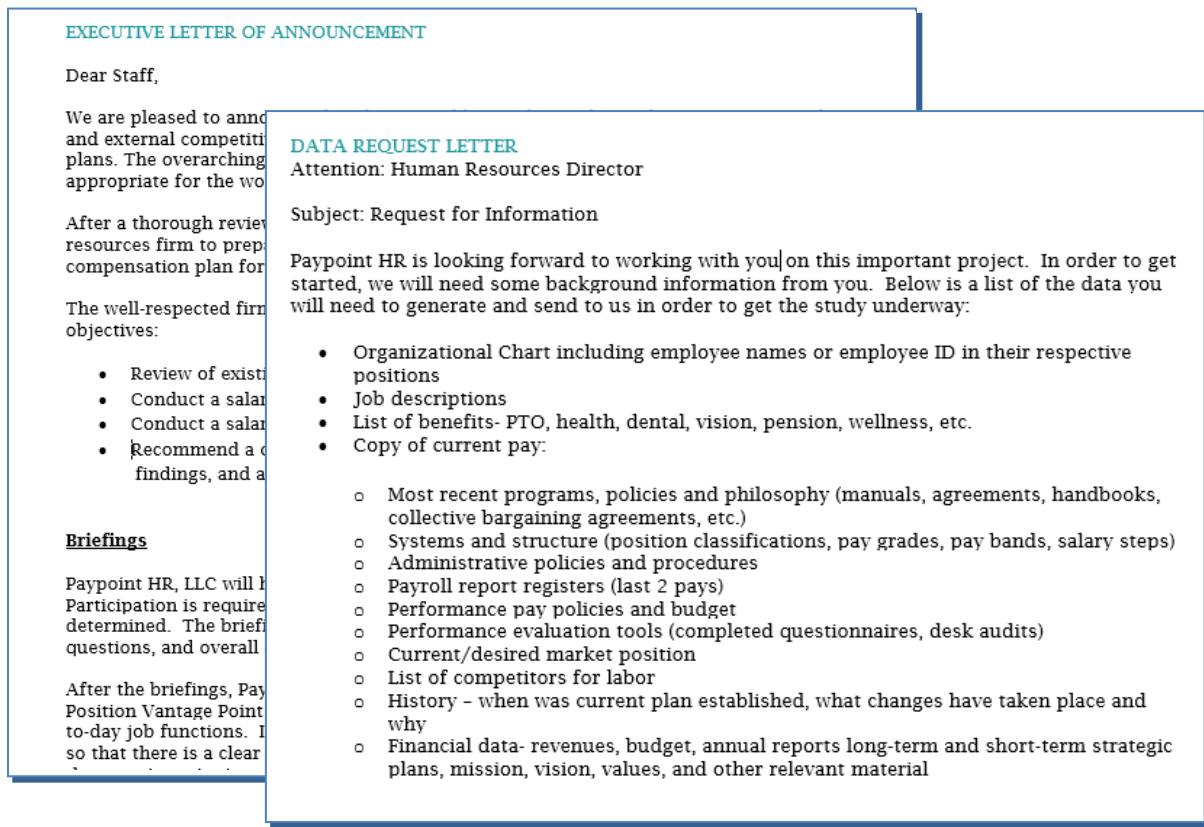


Figure 3 - Sample Letter Templates

Task 1B – Baseline Evaluation

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. 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.
- Gain understanding of employee recruiting and retention processes to uncover challenges in 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.
- 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.

Current Grade	#	# near Min	% near Min	# near Max	% near Max
9	7	5	71%	1	14%
10	2	1	50%	0	0%
11	8	5	63%	0	0%
12	13	5	38%	2	15%
13	8	2	25%	1	13%
14	7	1	14%	3	43%
15	8	3	38%	0	0%
16	15	2	13%	2	13%
17	5	2	40%	0	0%
18	8	0	0%	4	50%

Figure 4 – Sample Baseline Evaluation

Task 1C – Job Analysis Collection and Completion

The job analysis portion of the study includes employee outreach. We find that by having employee involvement, your staff will feel more valued. By gaining insight from employees about their position and the overall pay structure, in their own words, the study deliverables will be more relevant and as a result, employees will be more inclined to accept recommendations.

During this stage in the process, the following milestones will be met:

- Create two custom websites; one for the employees to complete the job analysis questionnaire (Position Vantage Point, or PVP), and one for supervisors to review a copy of the responses from the employees they oversee.
- Conduct employee briefing sessions to review their role, the role of supervisors, the scope of work to be covered by the study and to explain how to complete the PVP.
- Employees will be given a period of time to complete the PVP, usually 10 – 14 days. They may complete them either online or by hand via hard copy.
- Paypoint HR will manually input responses that are completed via the hard copy and create a central database. This database will be used to create the Supervisors review website.
- Paypoint HR will map Supervisors to their respective work groups and create login credentials for them to review a copy of responses.
- Supervisors will be able to view a copy of the employee's response and give their own answers to the same questions. Typically, this takes 7 – 10 days. Supervisors will not be able to make changes to the employee's response.
- Employee focus groups will be held with peer groups. Each group is asked questions from the same list and Paypoint HR looks at responses systematically to look for patterns, common themes, and areas/ ideas for improvement.

Task 1D – Job Evaluation and Classification Development

Task 1D of the project acknowledges the job analysis information and supporting material. The City may have Paypoint HR utilize an existing classification method or choose to utilize Paypoint HR's Compensable Factor System (CFS). Once the job analysis PVP is distributed, Paypoint HR will:

- Facilitate collection of job descriptions, desk audits, and supporting materials from the Study Project Leaders or designated Human Resource department contact. The job descriptions, audits, and supporting 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 organization.
- 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 results.
- 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.

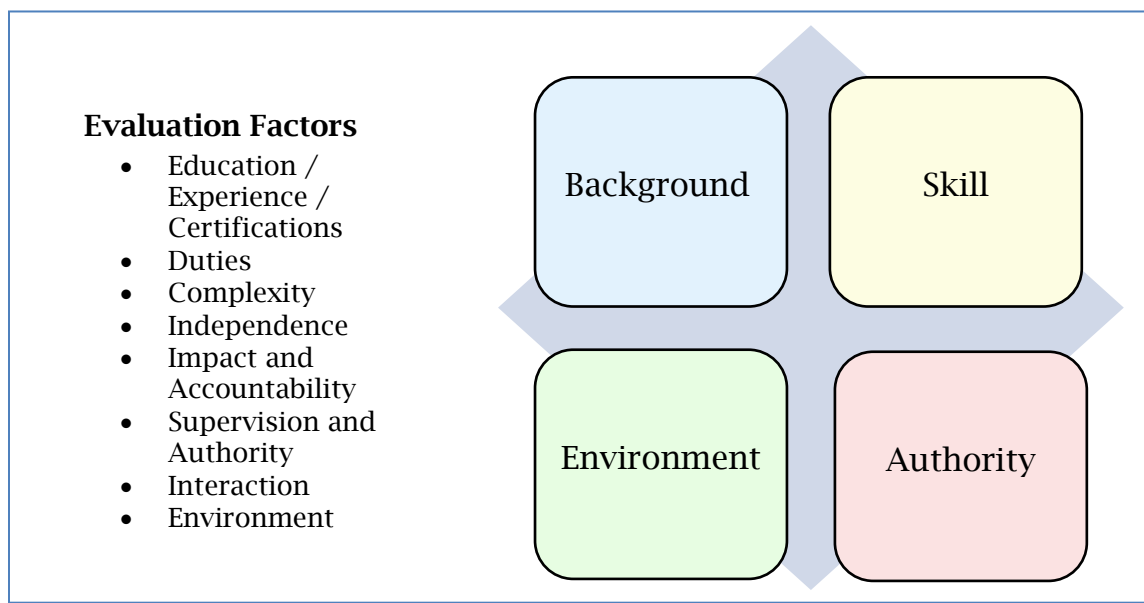


Figure 5 - Position Evaluation Factors (Example)

Prior to developing detailed class descriptions, our job evaluation will result in a classification plan concept and employee allocation discussion with the Project Team. We recognize the City 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 evaluation method involves a quantitative approach. The whole position classification methodology examines your current evaluation criteria and augments it with other factors as needed. Our analysis will include our assessment methodology. We 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 job families. We will also review and update established titling guidelines for the studied classifications for appropriate and consistent titling.

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.

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.

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 reorganizations that require new classifications.

Index of Current to Recommend Job Classes

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 6 - Sample Index of Current to Recommended 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.

Task 1E – Draft of Report Deliverables and Policy Guides

Task E of the project will draft a job class classification and allow for review by the City. This task includes the following activities:

- A draft copy of the revised/new class description with an allocation recommendation will be submitted to the Project Leaders.
- Department Heads and managers will receive a copy of their employees' draft job analysis and will be asked to review their comments and feedback to verify and concur with the information provided.
- Subsequently each manager, supervisor, and employee will be given 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 incorporates an appeals process to avoid formal grievances, adversarial meetings, or major conflicts after the study.
- Paypoint HR will provide a format for the client to show each employee whose position was studied, and how their position is being affected.
- The form will have two options for the employee's signature: one line is reserved for employees who have read and agree with their draft job duties; 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.

Task 1F – Develop Guide for Implementation of Changes 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 analysis and resulting recommendations;
- The recommended allocation list, and classification title changes, and
- Classification concepts and guidelines, as well as distinguishing characteristics and other pertinent information for implementation and continued maintenance of the pay plan.

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 2 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. The findings from the compensation component will be reviewed and analyzed to look for areas of possible improvement. Paypoint HR will create a pay structure that meets the City's objectives. We will give the City perspective on the economic impact adoption of the recommendations will have on the City. This will make the factors for implementation clear and help anticipate needed steps to meet the overall goals.

Task 2A – Identify Benchmark Positions and External Survey Comparator List

Task 2A of the compensation portion of the study will include identifying benchmark job positions and identifying a mutually agreed upon list of external comparators to be included in the external survey. In order to complete this, the following steps will be taken:

- 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, benefits, and policies as well as the regulatory environment surrounding compensation.
- Identifying highly competitive positions within the organization and customizing the survey where appropriate.
- 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 total compensation plays in retention issues.
- Reviewing the Project Team's philosophy with respect to fiscal sensitivity and flexibility.

"Benchmark classes" are normally chosen to reflect a broad spectrum of class levels. The positions that are selected normally include classes that are most likely to be found in other similar agencies and will therefore provide a sufficient and valid sample for analysis.

Benchmark positions should encompass the entire range of positions from the beginning of the pay ranges to the end. There should be a number of positions equally interspersed

among the pay scale. Positions that have been difficult to attract and retain excellent employees should be included. 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).

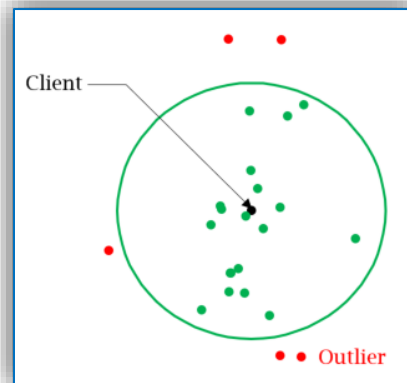


Figure 7 - Illustration of Economic Variance Using the Client as the Baseline

Paypoint HR will conduct an economic analysis of regional public and private organizations to identify a preliminary unbiased list of appropriate comparators. The purpose of this step is to ensure the worthiness and legitimacy of using these organizations to develop recommendations. This adds validity to the findings and yields defensible results. We will keep in mind the Project Team's criteria on such factors as degree of competition for obtaining and retaining candidates for high quality staff, their location in the City's traditional recruitment areas, and their level of service complexity. Paypoint HR uses objective parameters to determine the legitimacy of findings. Below is a list of possible criteria to consider when selecting organizations to be sampled:

Sample List of Selection Criteria

Median Housing Price	Unemployment Rate
Median Household Income	Labor Force Participation Rate
Cost of Living Adjustment	High School Graduation Rate
Proximity	Population

Each organization considered is given a variance score related to data points and an aggregate variance score is created. This will help identify the organizations whose results will provide validity to the study. Upon identifying benchmark positions and the selected comparators, Paypoint HR will then create the document for surveying the selected organizations and conduct the external survey.

Task 2B – Design and Distribute Survey

In Task 2B of the study, it is anticipated that the creation and distribution of the external survey will take place. This analysis will include a detailed concise presentation of data to be collected. The survey will include job titles along with a brief summary of each position. This approach allows respondents to compare job description to job description and not just job titles, therefore ensuring true "matches" from the survey respondents. Additionally, benefit related questions will be incorporated in order to understand the impact of total compensation.

Paypoint HR will send the survey to all comparators and if necessary, complete Freedom of Information Act (FOIA) requests. We conduct all of the survey distribution, data collection, and analysis ourselves to ensure validity of the data and to enforce quality control. While there is an industry standard of 5-15% response rate for surveys, Paypoint HR typically receives 25-40% response rates. While the surveys are out for distribution, Paypoint HR will further examine the existing compensation environment to establish a baseline and keep in contact with the Project Team.

Task 2C – Collect and Analyze Survey Data

Client's Job Title	Client's Job Summary	Match	Min	Mid	Max
Accounting Technician	Performs intermediate technical and clerical work involving the preparation and/or maintenance of fiscal or related records; does related work as required.	Exact Match - 100%	\$15.61	\$18.53	\$26.07
Administrative Assistant	Performs difficult skilled clerical work providing a variety of administrative, secretarial and record keeping duties; does related work as required.	Very Good Match - 75%	\$14.15	\$18.72	\$23.64
Benefit Programs Specialist I	Determines eligibility and re-determination of eligibility of individuals and families for financial assistance, food stamps, medical assistance, and other social services' benefit programs. Entry level.	Exact Match - 100%	\$19.92	\$19.95	\$33.26
Building Inspector	Performs intermediate technical work in the inspection of all phases of building plans and construction.	Exact Match - 100%	\$18.08	\$26.72	\$30.20
Chief Deputy Treasurer	Performs difficult technical and administrative work assisting in the operation of the Treasurer's Office; does related work as required.	Exact Match - 100%	\$35.77	\$45.37	\$59.74
Communications Officer	Performs intermediate skilled clerical work dispatching law enforcement, fire, rescue and other equipment and personnel usually in response to emergency situations; does related work as required.	Very Good Match - 75%	\$18.06	\$20.32	\$30.16
Communications Supervisor	Performs difficult technical work overseeing and participating in dispatching law enforcement, fire and rescue equipment and personnel to emergency and non emergency requests for service.	Very Good Match - 75%	\$20.95	\$25.92	\$34.99

Figure 8 – Sample of Job Summaries in External Survey

Following the distribution of the surveys, Paypoint HR will collect the data and 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. Paypoint HR will examine salary spread for all grades, ladders between grades, and identify the possibility of positions being compensated differently than intended from the existing plan. We will examine the distribution of employee salaries to highlight challenges and conduct an analysis of wage compression using Paypoint HR's proprietary statistical processes. Positions that contribute to compression are specifically identified for adjustment.

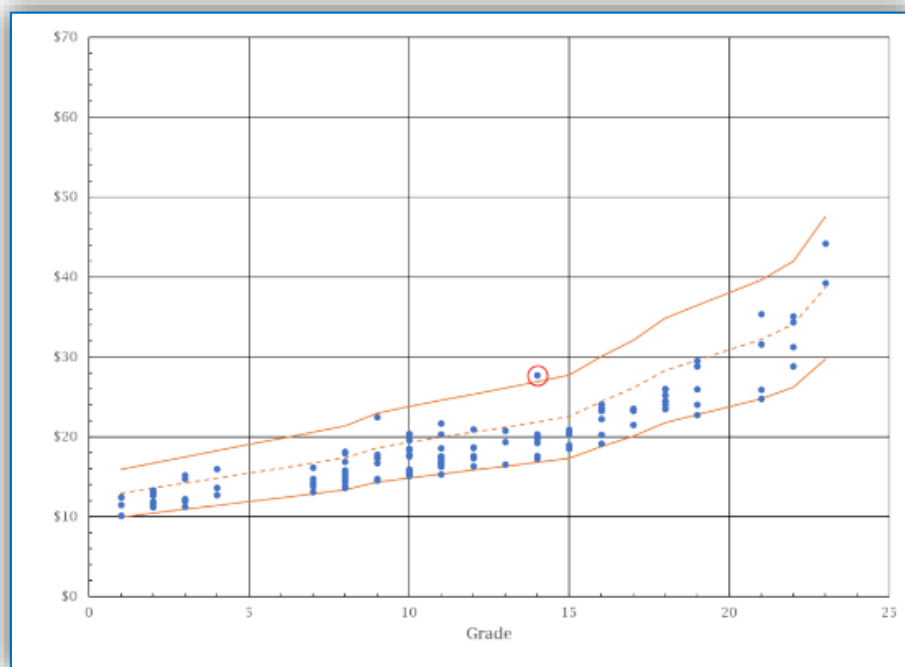


Figure 9 - Baseline Analysis of Client's Workforce

Task 2D – Internal Relationship Analysis and Alignment

To determine recommendations for internal equity, 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. 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.

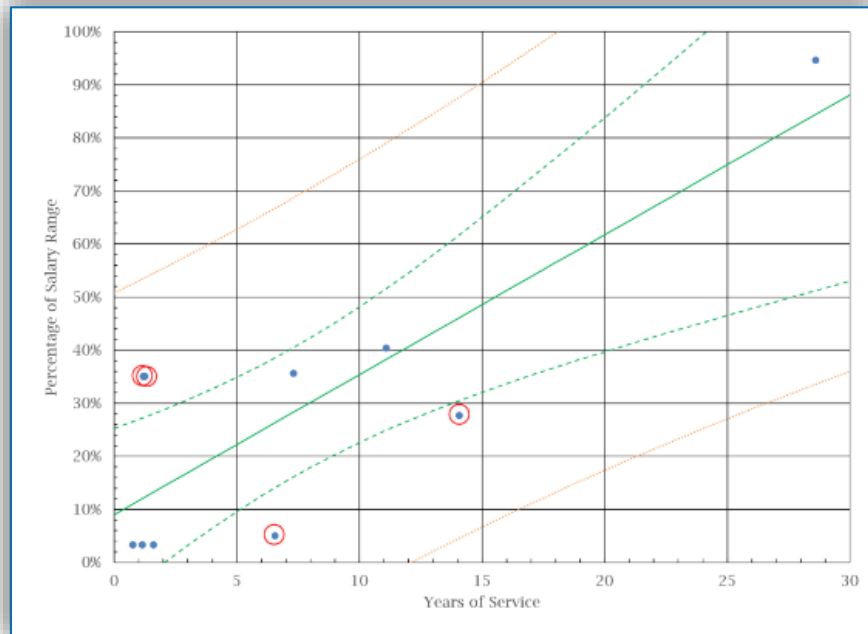


Figure 10 - Sample Internal Compression Analysis

Paypoint HR analytically develops an internal hierarchy based upon the job analysis responses. The ultimate goal of this critical step of the process is to address any internal equity issues and concerns with the current compensation system. We look for compression and inconsistencies. Our quantitative tool, Compensable Factor Score (CFS) system, allows us to objectively compare between certain classifications.

Current Grade	Job Title	CFS Score
25	Director of Public Works	95.7
24	Director of Fire & Rescue	83.4
24	Director of Human Resources	78.3
22	Deputy Director of Finance	43.5
FR 4	Lieutenant, Police	21.1
19	Senior Accountant	20.5
12	Crew Leader	13.9
13	GIS Specialist	12.4
2	Custodian	7.5

Figure 11 - Sample of Compensable Factor Score Results

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. The recommendations will contain pay differentials between levels that allow employees to progress on a clear path for 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. Paypoint HR's Compensable Factor Score (CFS) formulation provides a framework to construct an unbiased internal hierarchy of positions.



Figure 12 - Compensable Factor Score Example

The internal hierarchy is correlated with the findings of the external market, external equity, by using Paypoint HR's non-linear statistical algorithm. A 90% or greater correlation is typical, lending to confidence that both the internal and external equity are sound and appropriate.

Paypoint HR may choose to supplement the survey data with information from our own internal library. This helps to identify outliers and get a pulse on how the study results compare to the market as a whole.

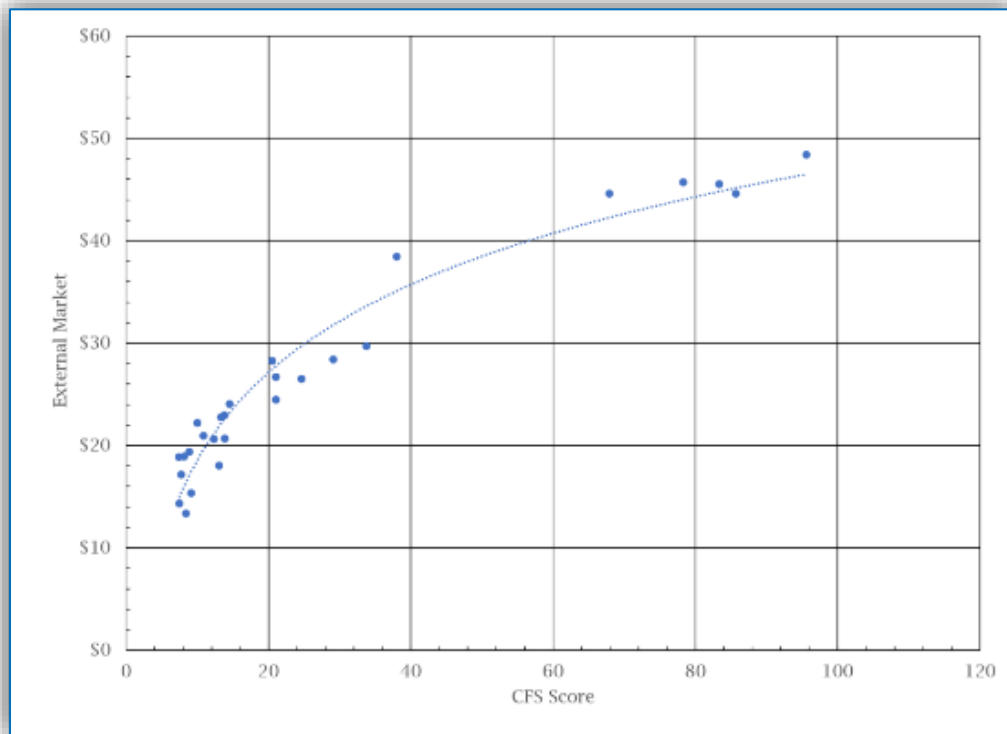


Figure 13 - Sample Comparison of Internal / External Hierarchy

Task 2E - Preparation of Draft Report

Depending on the data developed from the internal analysis, we will review and make recommendations regarding internal alignment of your salary structures including combining or expanding groups or salary scales. 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. We will also develop solutions to address pay equity issues. Our analysis includes information regarding the financial impact of addressing pay equity issues for the City. The end result is intended to create a market adjustment and implementation strategy supporting your goals, objectives, and budget considerations.

Positions will be categorized in a compensation ratio or “Compa-ratio” relating actual pay rates to market rates to determine if they are in-line with the external market. Positions will be classified by their Compa-ratio and determined to be either below, at, or above the market rate. We use these findings to make corrections to pay for each position which allows for fiscal impact analysis of recommendations.

	Accounting Technician I	Admin. Assistant	Asst. County Attorney	Asst. Landfill Manager
Market Percentiles				
20%	\$15.78	\$15.27	\$34.70	\$16.88
25%	\$17.17	\$16.03	\$36.37	\$17.91
30%	\$17.69	\$16.56	\$38.07	\$18.74
...
70%	\$22.92	\$22.18	\$52.69	\$24.75
75%	\$23.29	\$22.73	\$53.81	\$25.91
80%	\$24.27	\$23.75	\$55.44	\$26.88
Mean	\$20.25	\$19.51	\$45.41	\$22.29
Compa-Ratio	-1.6%	-6.3%	-11.3%	+8.4%

Figure 14 - Sample Compa-Ratio Results by Job Title

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 proposed Salary Range/Plan document;
- Any alternative compensation plans identified;
- Reports addressing employees whose base pay either is below or exceeds the market rate;
- The option to implement the recommended plan in phases;

After an initial round of feedback from the Study Project Leaders, we will make edits and resubmit the draft to the Project Team for review and approval. Final meetings with the Project Team and stakeholders will be conducted and any final adjustments are made prior to delivery of the final report to the appropriate stakeholders. Once all of your questions and concerns are addressed, a Final Report will be created and submitted in a bound format and electronic format.

Positions Compensated Substantially Below Market (% Diff < -10%)	
Accounting Technician I	Assistant County Attorney
GIS Specialist	GIS Technician
Maintenance Supervisor	Network Technician
Permit Specialist I	Water Meter Technician II
Positions Compensated Below Market (-10% < % Diff < -5%)	
Administrative Assistant	Custodian
Deputy Director of Technology	Landfill Truck Driver
Maintenance Worker	Parks and Recreation Manager
Payroll Specialist	Senior Systems Analyst

Figure 15 - Sample External Market Results Summary

Task 2F – Deliver Final Report and Deliverables for Implementation

Paypoint HR typically works on tight schedules that demand extensive communication. We first listen to our clients to understand their specific needs and then create recommendations that fulfill the purpose of the study. Our final report reviews the City's background as related to the study and conveys complex concepts clearly and concisely. We feel this is one of our strongest attributes. An area of communication where we particularly excel is in the ability to communicate with employees at all levels of education and background. The concepts covered during employee outreach are reflected in the final report, as appropriate. This improves morale as the employees feel valued by knowing they have been heard. We are a liaison and have discovered opportunities and issues that would not have otherwise been utilized or addressed.

The final report includes an Executive Summary that summarizes the study methodology and gives recommendations for consideration by the City. The report highlights specific areas where an opportunity exists to improve the City's Classification and Compensation programs. The strategic position of the existing plan is reviewed in relation to the findings and shows comparisons. Recommendations that affect the City's budget are reviewed and their financial impacts are projected to ensure the City is able to support them. The Final Report is developed in a way that is relevant to the current market as well as allows the City to make a long-term strategic plan for attracting and retaining staff. The work product includes steps for implementation, training, and ongoing administration.

Our recommendations have been well received by our audiences. We have developed valued relationships and are considered by our clients and their employees as a trusted advisor. We

welcome the opportunity to work with the City to prove ourselves as an excellent service-oriented firm.

Salary Recommendations

The fiscal impact of the recommendations listed below are approximate costs for salary adjustments only. It does not factor in associated costs for employee related benefits.

1. Raise the salary of 13 positions that are *substantially* below market, first, at a cost of \$102,438.
2. Raise the salary of 52 positions that are below market, second, at a cost of \$145,571.
3. Adjust the salaries of positions that are near market with normal base-salary and tenure adjustments.
4. Discontinue making base-salary adjustments to the salaries of positions that are above or *substantially* above market until compensation is near market. Continue providing tenure-based salary bonuses.
5. Adjust only the salary scale by the Southern Mid-Atlantic Consumer Price Index (CPI) yearly to help ensure that the County's salary plan keeps up with market. Individual salaries would not be scaled by the CPI.

Figure 16 - Sample of Study Recommendations

Content of Work Product

Below is a list of the types of deliverables our clients can expect. Please reference the Appendix section of the proposal for samples of our work products.

- On-site Kick-off meeting with Project Team and collaborative development of the Project Communication Plan.
- Project planning and methodology.
- Creation of two 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 Evaluation report completed using scores from job analysis responses.
- Comparator Analysis reports to identify localities that compete for labor with the City.
- Development of agreed benchmark positions.
- External Market Survey for comparators with benchmark job titles and short job summaries.
- On-site Focus Groups with both qualitative and quantitative findings summary report.

- Creation of Recommendations for Reclassifications report, including job title simplification.
- Development of a Compensable Factor Scoring System report and website for use and maintenance of job evaluations and internal equity.
- Development of training for ongoing administration and implementation along with supporting 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 report showing costs associated to the selected strategic market position.
- Cumulative Final Report for presentation which shows methodology, procedures, development of findings, work product deliverables, and the financial impact of recommendations.

Implementation

Communication with the Project Team and key stakeholders are described at each step in the process of our project methodology. We consider our audience for implementation to be 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. Various media is used during the project to convey changes. We include: online access to information, written communication, forms, face-to-face meetings, electronic communication, as well as virtual meetings. Weekly progress reports will be provided to the Project Team. Paypoint HR will also provide to the Project Team status reports every four weeks then bi-weekly the last 60 days. 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.

- Paypoint HR provides forms for discussions with personnel regarding how the changes affect them individually.
- We create Job Discussion Request (JDR) and Job Discussion Guide (JDG) forms for employees and their supervisors to complete and submit to the Human Resources department. 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.
- 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;
- Train the trainer sessions; and,
- Proprietary cloud-based software and support plan options.

Maintenance

The City will receive tools from Paypoint HR for continued maintenance of the adopted pay plan. Example of these tools include:

- Access to the CFS system for placement of new positions or positions that have experience a substantial change,
- Training materials for implementation and maintenance,
- Policy manual, guides and forms,
- Job analysis update processes and procedures, and
- A “Train the Trainer” guide for transfer of administration.

To conduct a proactive 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. Paypoint HR will be available as needed to support the client in the implementation 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.

Tentative Timeline

Our professional experience is that comprehensive studies of this scope and for this size organization take no more than 24 weeks to complete, allowing for adequate position vantage point completion, interview time, classification description development, compensation data collection and analysis, review of steps by the client, the development of final reports, and any appeals.

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.

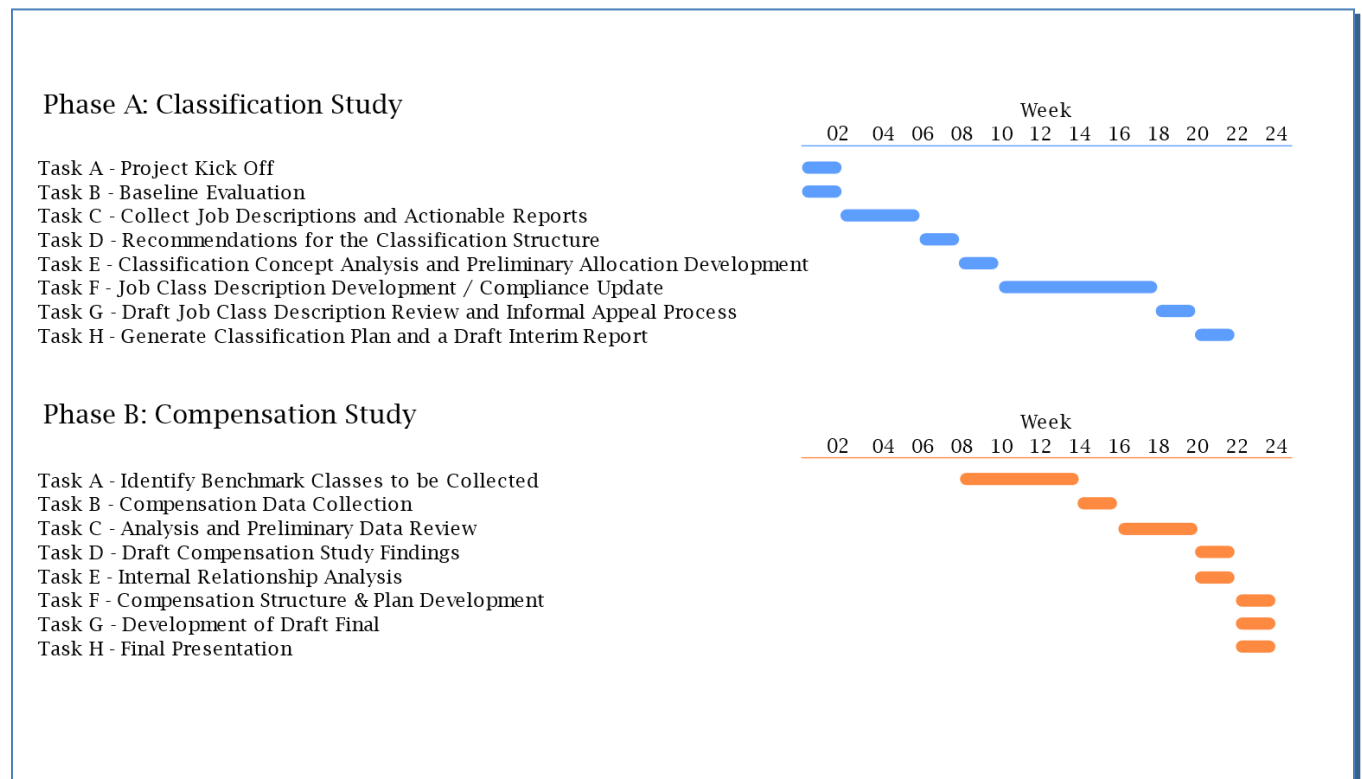


Figure 17 - Gantt Chart

References

Contact Name	Contact Info	Project Title and Service Dates
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Donna Swatzell Director of Finance City of Nixa, MO	715 W. Mt. Vernon Street Nixa, MO 65714 (417) 724-5625 DSwatzell@Nixa.com	Employee Compensation, Benefits and Classification Consulting Services 2018
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Jennifer Mongold Director of Human Resources Rockingham County, VA	20 East Gay Street Harrisonburg, VA 22302 (540) 564-2740 JMongold@RockinghamCountyVA.gov	Classification and Compensation Study 2018
Julie Bush Director of Human Resources Town of Front Royal, VA	102 E. Main Street, 2 nd Floor Front Royal, VA 22630 (540) 635-3929 JBush@FrontRoyalVA.com	Classification and Compensation Study 2017

Contact Name	Contact Info	Project Title and Service Dates
Debbie Pengelly Human Resources Director City of Glenpool, OK	12205 S. Yukon Avenue Glenpool, OK 74033 (918) 209-4644 DPengelly@CityofGlenpool.com	Compensation Study 2017
Eddie Lawrence Superintendent Northampton County Public Schools, VA	7207 Young St Machipongo, VA 23405 (757) 678-5151 ELawrence@NCPSK12.com	Staffing Level, Economic Comparison, and Compensation Study 2017
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Michelle D. Cichoki Director of Human Resources City of Bethlehem, PA	10 East Church Street, Bethlehem, PA 18018 (610) 865-7015 Mcichoki@Bethlehem-PA.gov	Classification and Compensation Survey 2017
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Stephanie Weaver HR Director City of South Portland, ME	25 Cottage Rd South Portland, ME 04106 (207) 767-7667 sweaver@southportland.org	Compensation and Classification Study 2020

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Cassie Green Human Resources Director County of Otero, NM	1101 New York Avenue Alamogordo, NM 88310 (575) 437-7427 - phone (575) 439-2607 - direct cgreen@co.otero.nm.us	Classification and Compensation Study 2020
Tammy Burnett, Director of Human Resources Oklahoma City Zoo and Botanical Garden	2000 Remington Way Oklahoma City, OK 73111 Office: 405-425-0283 TBurnett@okczoo.org	Classification and Compensation Study 2019
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Cost Proposal

PHASE 1 Classification Component

Task		Hours
A	Project Start and Initial Meetings	10
B	Baseline Data Collections & Initial Analysis	10
C	Job Analysis Collection/Completion & Focus Groups	16
D	Job Evaluation and Classification Development	16
E	Draft Reports and Policy Guides	16
F	Develop Guide for Implementation of Changes and Draft Interim Report	12
	Subtotal Professional Hours	80

PHASE 2 Compensation Component

Task		Hours
A	Identify Benchmark Positions and External Survey Comparator List	10
B	Design and Distribution of Survey	10
C	Collect and Analyze Survey Data	16
D	Internal Relationship Analysis and Internal Alignment	16
E	Preparation of Draft Report	16
F	Deliver Final Report and Work Products for Implementation	12
	Subtotal Professional Hours	80

Total Estimated Hours of Phase 1 & Phase 2	160
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Paypoint expects support from the Client in communication with key staff, setting up meetings, and providing meeting resources, as well as establishing reporting relationships, milestones, and timelines.


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 160 hours of service, the total fee would be \$20,000. While actual work hours may vary in order to meet the scope of work as prescribed in the RFP, Paypoint HR guarantees a firm, fixed price of \$20,000. Our fee includes expenses associated with phone, materials, and supplies. Any travel will be billed at cost. Any services provided outside of the scope of work will be agreed to by both parties in writing in advance and will be performed at a rate of \$125 per hour.

We are flexible on billing and typically invoice on a biweekly basis with a net 30 payment expectation.

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 HR'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 service.

Appendix – Sample Work Products



**City of Stuart, Florida
Classification and Compensation Study
Effective Date – October 7, 2019**

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

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Executive Summary

Paypoint HR is pleased to present this comprehensive Classification and Compensation Study to the City of Stuart, Florida. The study began with an initial kick-off meeting conference call held with the City's Project Team on March 8, 2019. The Final Report was completed for presentation to the City Commission, with an effective date of October 7, 2019.

The point of the Executive Summary is to give an overview of the most important issues and opportunities identified by the consulting team during the study. The reader is highly encouraged to read the document in its entirety in order to gain an understanding of the recommendations within the report. The study takes into consideration both short and long-term concerns. The intent of the study was to provide the leadership team and City Commission with a process for ascertaining equitable value of positions on a competitive salary scale. The study compared existing pay to compensation scales of organizations identified to be valid comparators the City of Stuart. This report provides review and update of the classification and compensation plan for the City's employees. Paypoint HR has identified opportunities, but it is up to the City Commission to determine which are most appropriate and the timing of implementation.

In considering the options for implementation, it is critical to understand the costs and benefits related to each option. By utilizing market data and analysis it is possible to make informed decisions with regard to possible changes. However, in addition to the quantitative economic cost and benefit, it is important to consider the social/cultural impact of implementation and management. Stuart will need to consider all components in making final decisions.

The study was divided into two parts: a classification phase and a compensation phase. The classification phase included identification, review, and analysis of specific work being performed in various positions. That data was then used to simplify positions and match them to the external market in an "apples to apples" comparison. The compensation phase consisted of an initial compression analysis and an external market survey of local public and private sector organizations to determine what the local labor market pays for specific jobs.

The study included approximately 275 employees within roughly 122 distinct positions. The study recommendations indicate what actions should be taken, to avoid loss of qualified staff and address difficulties in recruiting new employees for the City. In addition, it was expected that the study would recommend adjustments to the City's salary placement procedures, policies, and salary structure, to allow appropriate ongoing compensation administration.

Comprehensive surveys like this establish a credible pay structure that is fair for the work completed and strategically positions Stuart competitively in the labor market. The desired result is the improved ability to attract and retain quality staff that perform at high levels to meet the growing demands of the community.

Major Milestones for the Project

- A Kick-off meeting conference call was held on March 8, 2019 with the City's Project Team.
- Employee Briefing Sessions were held onsite over a two-day period on April 25th and 26th, 2019 with groups of employees from all departments to discuss the project, their roles, and to review the job analysis questionnaire.
- A custom website was created for the City to have employees complete a Position Vantage Point (PVP) job analysis questionnaire. A paper version of the PVP was made available as well.
- A second custom website was created with a copy of all 224 completed PVP's for managers to review. Managers were able to give their own responses to the same questions for the position but were not able to change the employee's responses.
- Paypoint HR conducted a job evaluation for an internal review of job family classifications based on the employee and manager responses to the PVP's.
- An analysis of the existing pay scale was completed.
- External Market Comparators were vetted using economic and demographic data to determine which comparators were most like Stuart to ensure validity. In order to identify relevant and comparable organizations we restricted our search to a 150-mile radius which included Tallahassee, Florida to the Alabama coast.
- Internal positions were reviewed, and benchmark positions were selected for inclusion in the external survey.
- The external market survey was sent out to a total of 53 comparator organizations and responses from 20 participants were collected. Typical surveys of this type yield a 5-10% response rate. The City of Stuart's study response rate is considered strong at 38%. Respondents included the following organizations:

Respondents

Auburndale
Cocoa
Greenacres
Haines City
Jupiter
Martin County

Miami Lakes
North Palm Beach
Okeechobee
Palm Springs
Port St. Lucie
Punta Gorda

Sebastian
Titusville
Vero Beach
West Melbourne

Police Respondents

Auburndale	Lake Worth **	Punta Gorda
Cocoa	Martin County	Riviera Beach
Dania Beach *	North Palm Beach	Sebastian
Greenacres **	Okeechobee	West Melbourne
Haines City	Palm Springs	West Palm Beach
Jupiter	Port St. Lucie	

* - Broward County Sheriff Office

** - Palm Beach County Sheriff Office

- From both the internal and external market analysis, recommendations for a new pay scale was developed and individual job titles were assigned to the new pay grades.
- Paypoint HR conducted 8 onsite focus groups with approximately 96 employees from all departments. The Consultants met with employees by their peer categories over a two-day period on June 19th and 20th, 2019. The purpose of the focus groups was to gain a better understanding of the existing compensation plan and areas of possible improvement.
- Paypoint HR reviewed positions for Fair Labor Standards Act (FLSA) overtime exemption status.
- A draft report was generated for the Project Team along with updates to job descriptions. Job descriptions were updated and standardized using PVP responses from employees and managers.

Next steps will include review by the City's staff of the updated job descriptions and training for the Project Team on administration and management of the new classification and compensation structure. Tools that will be made available include the Compensable Factor Scoring (CFS) website, a PowerPoint training presentation, policy manual, individual employee discussion forms, job discussion request forms, and job discussion guidelines.

Recommendations

Salary Recommendations

The fiscal impact of the recommendations listed below are approximate costs for salary adjustments only assuming a 2080-hour work week (2496-hour work week for Fire Rescue). It does not factor in associated costs for employee related benefits. Employees covered by Collective Bargaining Agreements are not included in the recommendations.

1. Raise the salary of 109 positions that are below market.
2. Continue the discontinuation of base-salary adjustments to the salaries of positions that are above market until compensation is near market

For employees newly hired or who change positions within the City during the implementation, it is recommended that their salary be placed in the salary scale assuming full-implementation of the recommendations. Any compression resulting should be alleviated upon full-implementation of the recommendations.

Scope of Work

Scope A – Job Classification

- A-1 Conduct a job audit of selected benchmark positions, including general task analysis by department. This review may include interviews with Department Directors, division managers and other key personnel and/or employees to determine the essential functions of each position. Benchmark positions to be determined by the project team, input from Department Directors and guidance from the consultant.
- A-2 If deemed the appropriate method, prepare/provide a job analysis questionnaire for City management approval. The City would facilitate its distribution and completion.
- A-3 Assign all jobs to salary grades based on an objective evaluation of compensable factors related to the duties and responsibilities of the individual job.
- A-4 Refine job classifications/titles to accurately represent job duties and responsibilities as necessary. Review supervisor/management titles and recommend titling structure which defines consistent levels of responsibility across the organization.
- A-5 Review a sampling of existing job descriptions and recommend updates, as needed, including requirements of education, experience, knowledge, skills, and abilities.
- A-6 Map career ladders/promotional opportunities for selected classifications.
- A-7 Provide methodology for evaluating the classification of positions/jobs on an ongoing basis. Train Human Resources personnel in the administration of the proposed new/modified classification system.
- A-8 Assess FLSA designation for select positions.

Scope B – Compensation

- B-1 Review the current pay grade and salary ranges of City positions, including recommending appropriate salary ranges based on compensation survey and study results and appropriate salary range for each position.
- B-2 Evaluate current pay plan structure (i.e. number of pay grades, including additions, deletions, and/or consolidations, appropriateness of pay range spread from salary minimum to maximum).
- B-3 Conduct interviews, as necessary, with City Manager, Human Resources personnel, and Department Directors for the purpose of clarifying and determining project scope, selection of entities to be surveyed, and identification of benchmark positions. Listing of the benchmark agencies to be utilized in the study shall be subject to review and approval by the project and/or executive team prior to the initiation of the work.
- B-4 Determine the appropriate labor markets for the study (non-bargaining, PBA, and IAFF) and determine existence of relevant salary survey data.
- B-5 Develop and conduct an external compensation survey comparing benchmark positions with other local government and private sector entities in order to

- identify the City's competitive position in the regional labor market. This compensation survey shall include the actual salaries and tenure in position of employees in said benchmark positions, with anomalies identified.
- B-6 Conduct internal pay equity assessment of benchmark positions based upon actual work performed, value of work performed to the organization, and length of service with consideration of merit increase history.
 - B-7 Recommend alignment of pay grades and salary ranges of benchmark positions in order to achieve competitiveness in regional labor market, and internal equity.
 - B-8 Review existing pay practices and policies at the City and provide recommendations based upon analysis of external market competitiveness and internal equity.
 - B-9 Provide financial impact of the recommended salary alignments and changes to pay practices. Assist in the development of a strategic plan to implement study recommendations, including budgetary impact (if any), over one or more fiscal years, and alternative strategies as necessary.
 - B-10 Provide methodology for maintaining and updating the proposed new/modified compensation system.
 - B-11 Develop guideline and/or a tool for assigning pay grades to future/new or reclassified positions. Train Human Resources personnel in the administration of the proposed new/modified compensation system.

Benefit Summary

Paypoint HR feels it is appropriate to consider benefits when addressing strategic planning of compensations as there is a dynamic relationship between employers and employees. When depicting the strategic elements of pay, external influences and an evolving business environment affect attraction, retention, and engagement.

A total rewards review of compensation incorporates all components organizations utilize to cultivate quality employees. An effective total rewards strategy produces a workforce that has the right people in the right jobs who are motivated and engaged to meet goals and feel loyal to the organization and its success.

The elements that contribute to Total Rewards are:

- Compensation,
- Benefits,
- Work-life effectiveness,
- Recognition,
- Performance management, and
- Talent development.

The information provided in this portion of the report is not intended to be an exhaustive benefit survey comparing the benefit summaries, premiums, co-pays, and deductibles. The benefit survey was designed to get a snapshot of the participant's employee benefit offerings. Where possible, Paypoint HR uses the information gathered from the external survey to analyze findings.

Benefit offerings are often considered in aggregate data. Caution should be exercised in the following:

- When interpreting the information, as elements within each organization are not equal. For example, there may be more part-time or seasonal workers employed at an organization who are not eligible for benefits. Using part-time or seasonal wages in the calculation could skew the findings.
- When adjusting pay, certain costs such as medical premiums, workers' compensation premiums and pension contributions will automatically increase as pay increases. Responsible employers will consider the additional costs related to these changes.

Questions included in the External Benefit Survey addressed the following:

1. Does your organization have a pay for performance system in place? For example, a bonus or stipend plan? How does it work?
2. When was the last time you completed a Pay Study and make adjustments to your compensation plan?
3. What do benefits cost the organization in relation to the total compensation? For example, Salaries/Benefit ratio 68/32. What benefits are included in your calculation (Health, Dental & Vision premiums, FICA, Life Insurance, Pension Contributions, HSA contributions, tuition, Workers' Compensation)?
4. Do you offer major medical, dental & vision benefits for family and single coverage? What is the employer/employee contributions to premiums?
5. What is the out of pocket maximums for the health insurance?
6. Do you offer employer paid HSA or HRA contributions for employees? Please explain.
7. What other employer sponsored benefits do you offer? Do you offer life insurance, AD&D, Short-term/Long-term Disability etc.?
8. Do you offer any standby pay? Please explain.
9. What leave benefits do you offer (vacation, holiday, sick, PTO, Extended Illness Accrual Bank (EIAB), and comp-time?
10. Do you offer a phone allowance or phone use for employees?

The City of Stuart's Current Employee Benefit Offering

The City of Stuart uses multiple resources to convey messages regarding employee benefits and items that impact staff. The City's Human Resources department distributes a monthly "Around the City" flier. The flier is available in print and, with prior approval of featured employees, on its Facebook page. Content consists of a "welcome aboard" section for new hires, names of those who received service awards, the employee of the month, and an employee spotlight bio. A recurring item on the flier is a listing of City values and HR contacts.

Benefit information can be found in the "2018/2019 Employee Benefit Highlight" booklet. The booklet is a summary of the benefits the City makes available to employees and lists contacts at the vendors for employees to receive additional information and customer service for their individual benefits. The City has an Employee Handbook that covers policies for day to day operational items like Paid Time Off (PTO), Holidays, Service Recognition, and Tuition Reimbursement.

Additionally, the City has Collective Bargaining Agreements (CBAs) with the Professional Firefighters of Stuart Local #2411 (IAFF) and the Palm Beach County Benevolent Association, Inc. (PBA) that lists benefit information for their respective covered employees.

List of Employee Benefits Sponsored by the City of Stuart for Eligible Employees

Health Insurance – The City offers two 4-tier Medical plans. For the base plan, the City pays 90% of the individual level premiums and 81% of the family level premiums.

Health Insurance Premium Savings Program – Employees may save \$50 per month by demonstrating a tobacco-free lifestyle through cotinine testing or participating in a Tobacco Cessation Program. Employees may save an additional \$50 per month by completing all three (3) steps of an annual Health Risk Assessment through the City's Employee Health Center, a third-party administrator.

Healthy Rewards – Through the health insurance carrier, eligible employees have access to discounted health and wellness programs.

24-Hour Help Information Hotline – Through the health insurance carrier, eligible employees have access to qualified nurses on a range of health topics.

Telehealth – Through the health insurance carrier, eligible employees have access to 24/7 on-demand access to affordable medical care via phone for applicable urgent care events.

Opt-Out Benefit – Eligible employees who waive healthcare through the City receive a stipend of up to \$200 per month.

Dental Insurance – The City offers 2 Dental plans. For the base plan the City pays 100% of the individual level premiums and 52% of the family level premiums.

Vision Insurance – The City offers one Vision plan. Premiums are paid by the employee for all levels of coverage.

Flexible Spending Accounts (FSAs) – Eligible employees may set aside money for anticipated qualified health and dependent care expenses. This is subject to IRS Section 125 guidelines.

Employee Assistance Program (EAP) – All full-time and part-time employees have access to free, confidential, and convenient professional services to address a variety of issues that may negatively impact an employee or family member's well-being.

Basic Life and AD&D Insurance – Eligible employees qualify for up to \$50,000 in life insurance and an AD&D policy coverage paid for by the City depending on employment classification.

Voluntary Life Insurance – Eligible employees may elect to purchase additional life insurance at their own expense.

Voluntary Short and Long-Term Disability (STD & LTD) – Eligible employees may elect to purchase STD and LTD benefits at their own expense.

Employee Health Centers – Eligible employees have access to free medical care through a contractual agreement between the City and an Employee Health Center.

Working on Wellness (WOW) - The WOW program offers creative ways to improve the quality of life for City employees, their families, and loved ones.

Personal Supplemental Insurance – Employees may elect insurance coverage for critical care and voluntary insurance products at their own expense.

Legal & Identity Protection Plans – Employees may elect to participate in a discounted legal service at their own expense.

Pet Insurance – Employees may elect to purchase pet benefits from two carriers at their own expense.

DreamTrips Vacations – Employees may enroll for a discount vacation membership plan at their own expense.

Other Insurance Offerings – Employees may elect to purchase property, life, or vehicle insurance through a preferred vendor with the City at their own expense.

Retirement Plans

- Deferred Compensation Retirement Plans governed by Section 457 of IRS Code
- Florida Retirement System (FRS) – in accordance with FRS directives, all employees must contribute 3% of their pre-tax earnings to either the Pension Plan or the Investment Plan. The City also contributes on the employee's behalf, as articulated in FRS regulations.

City Programs

- Safety Program
- Family Friendly Program
- Service Recognition Program
- Tuition Reimbursement

Cell Phone

- City issued cell phone (applicable positions only)
- Cell phone stipend – Eligible employees may receive between \$40 to \$115 per month for use of various cellular plan service types depending on department and level.

Standby Pay, Callback Pay, Other Pay Provisions

- The City offers standby pay, callback pay, and other provisions to those to whom it applies. Details are articulated in the City's Employee Handbook or applicable Collective Bargaining Agreement.
- Certain bargaining positions also qualify for standby pay, as articulated in CBAs.

Holiday Pay

- Eligible full-time, non-bargaining employees receive 9 paid holidays and 2 additional Optional Holidays. Holiday pay is immediate, and Optional Holidays are released after the successful completion of the initial probationary period.
- Due to the unique nature of work performed, Police Dispatchers receive 32 hours (four 8-hour shifts) of Optional Holiday time after 6 the successful completion of the initial probationary period.
- Unused Optional Holidays are not payable at the time of separation of employment. Holidays and Optional Holidays are considered hours worked for purposes of overtime or compensatory time.
- Holiday Pay is negotiated with the two collective bargaining units and is articulated in their respective CBAs.

Birthday Day - Eligible full-time, non-bargaining employees receive 1 paid Birthday Day each year. Birthday Days are also negotiated with the two collective bargaining units; however, at the present time, neither bargaining unit offers a Birthday Day to their members.

Paid Time Off (PTO), Sick Banks, Vacation Banks

- The PTO Leave program was introduced in October of 2010; employees hired after October 1, 2010 receive a different accrual and maximum limit than those hired prior to October 1, 2010.
- Employees with vacation banks at the time of the PTO implementation had hours transferred into the new program.
- Employees with sick banks were allowed to retain those hours in a separate bank identified as "Sick Frozen," as the bank would no longer accrue hours.
- The City offers Paid Time Off (PTO) to all full-time employees, with use permitted after successfully completing the initial probationary period,
- Program details vary among non-bargaining employees, IAFF, and PBA and can be found in the Employee Handbook and applicable CBAs.
- Employees who have successfully completed their initial probationary period will receive 100% of unused PTO up to applicable bank limits upon separation.
- Non-Bargaining and IAFF employees receive 50% of "Sick Frozen" banks upon separation, and PBA employees receive up to 55%.
- Employees may also cash out up to \$5,000 per fiscal year from their PTO banks, leaving a balance of 200 or 240 hours, depending on the employee's employment category, after the cash out.

- Employees may donate PTO hours to eligible co-workers who are out of work on approved FMLA and out of bank time.
- The City Manager, City Attorney, City Clerk, Financial Services Director, Human Resources Director, Police Chief, Fire Chief, Public Works Director, Development Director, and Information Services Director have an additional 40 hours of PTO included in their annual accrual.

Leave Donation Bank – The City understands that employees may suffer from a catastrophic illness at which time they may submit a written request for the establishment of a Leave Donation Bank for staff to donate to the absent employee.

Merit Pay

- Merit-based performance pay for non-bargaining employees, if applicable, is addressed every fiscal year and presented to the Commission for approval. As of this writing (FY19), non-bargaining employees who receive a satisfactory rating or higher on their performance evaluation will receive a 3% increase, which will be added to based pay, not to exceed the maximum of the designated salary range. Full-time employees for whom the 3% equates to less than \$1,000 annually will receive the balance in a lump sum payment.
- PBA employees follow a career progression which includes a performance standard and incorporates increases in pay based on reaching career milestones.
- For PBA employees, and unless otherwise collectively bargained, beginning October 1, 2019, and ending September 30, 2021, members who receive an overall rating of “Meets Expectations” on their annual performance evaluation will receive a 3% increase to their base pay, not to exceed the maximum of the designated salary range. Employees who reach the maximum of their salary range during the calculation of the 3% will receive the remainder in a lump sum. Employees who are over the salary range for their classification at the time of their annual performance evaluation will receive a one-time lump sum of \$1,000.00
- For IAFF employees, and unless otherwise collectively bargained, and through September 30, 2019, merit pay is a 2% increase for Satisfactory or better on their performance rating and have no disciplinary action during the evaluation period. Those at the top of their pay scale for their classification, receive a one-time lump sum payment of \$1,000.

Tuition Reimbursement

Tuition reimbursement for all full-time employees is described in the City’s Employee Handbook. Approved applications for tuition reimbursement are submitted to the Finance Department and once grades are received, the employee may receive reimbursement of up to 100% based on their grade in the course. Tuition reimbursement in excess of \$5,250 per calendar year is considered a taxable fringe benefit, subject to payroll taxes.

Education Incentive

For IAFF employees, and unless otherwise collectively bargained, and through September 30, 2019, and Education Incentive may be applied to base pay. Employees successfully completing two (2) or more job-related classes equivalent to two (2) college semesters of classroom and clinical hours, and/or 80 total clock hours of off-duty job-related training classes as determined by the Fire Chief, within the fiscal year, shall be awarded a 1% salary increase or, no less than \$1,000 added to the base of their pay. Job-required classes / training are excluded from the 80-hour calculation described above.

Certification Pay

- Water Treatment and Water Distribution employees receive certification pay up to \$125 monthly with a State of Florida active license above the minimum of a "C". Dual licensing for both water and wastewater is eligible for an additional \$50 monthly pay. For those who voluntarily obtain a Wastewater Collection or Storm Water Systems Industrial Pre-Treatment certifications may receive up to \$75 per month.
- Employees who obtain voluntary certification through the National Institute for Automotive Services Excellence shall be eligible to receive voluntary certification pay. Employees obtaining and maintaining voluntary ASE certification as an Automotive Technician, Medium/Heavy Truck Technician, or Truck Equipment Technician shall receive voluntary certification pay monthly of \$10 per month.
- The City provides an incentive for employees, not otherwise provided for in the Certification Pay provision, to obtain certifications beyond their current minimum job requirements which will enhance their knowledge in their current position (job relatedness) and add value to the department as well as the City. Upon meeting certain criteria, an employee may receive a one-time lump-sum bonus of \$1,000. This incentive may apply to an employee every other year.
- Stuart Fire Rescue Battalion Chiefs may be entitled to incentive pay of \$40.00 per month if certified and possess the required education and training in the following areas of expertise: "Hazardous Materials," "Municipal Fire Inspector," "SCBA Repair Technician," and "ACLS Instructor." This incentive pay is at the discretion of the Fire Chief and may continue until such employee is no longer certified. Employee cannot receive certification pay and incentive pay for the same certification.
- For employees required to maintain CDL licenses, the city shall reimburse the employee for each renewal fee.
- Additional pay provisions exist within the CBAs for PBA and IAFF, including educational pay for Associate and Bachelor Degrees. These incentives are reimbursed to the City by the State, per Florida State Statute.

Benefit Survey Responses

The chart below provides counts and percentage breakdowns of the market peers and Stuart's full-time and part-time employees. The market comparator organizations were made up of, on average, 92% full-time employees and 8% part-time employees. For Stuart, this percentage was 87% full-time, and 13% part-time. The number of full-time and part-time employees can influence the benefits offered by an organization. Logically, the more full-time, benefit eligible employees an organization has, it's more likely that the amount paid towards benefit offerings will be higher.

Table 1 - Percentage of Full-Time and Part-Time Employees

Personnel Count	Market Average		Stuart	
Full-Time Employees	703	92%	275	87%
Part-Time Employees	65	8%	42	13%
Total	768	100%	317	100%

The percentage of benefits in relation to total compensation is a common broad indicator that organizations use to assess how generous the discretionary benefits are at individual organizations. Total compensation refers to the compensation package (salary and benefits) an employee receives from its organization. Therefore, benefits as a percentage of total compensation is calculated by dividing benefits expressed as a dollar amount by the amount of total compensation (salary plus benefits).

This study asked respondents to state what they calculated towards benefits. Generally, benefits they cited included health, dental, and vision premiums; life insurance; workers' compensation; pension; and FICA, though organizations may calculate this number differently.

Stuart's cost of benefits as a percent of total compensation was roughly 32%. The external market comparator average was 33%. The national average for the cost of benefits as a percent of total compensation is between 30 and 35% for non-union employee groups and 40 and 45% for union employee groups. The study did not ask respondents to disclose the union presence or prevalence within their organization. Also, it is common for benefit contributions to vary depending on the compensation practices of the organization and the relative cost of benefits.

Performance Pay and Pay Adjustments

Of the respondents roughly 20% stated they offered a pay-for-performance incentive element to their pay system. Adjustments to pay were reported as being made based on COLA, Performance, Work Assignment, Union Agreements, and market. The majority of

respondents reported across the board adjustments were made based on the market. Roughly 67% stated they had made across the board adjustments to pay in the last two (2) years.

Major Medical, Dental, and Vision

Roughly 80% of respondents stated they offer medical, dental, and vision benefits to their employees and 20% of respondents stated they offered only dental and vision benefits to employees. Analysis from the benefit survey findings yielded the following results on the amount employers contributed towards medical premiums.

Medical Benefits

Individual Level

- 67% of respondents contributed 100% of premiums for individual employee level medical coverage
- The average percent paid by the responding employers for individual level medical premiums was 96%.
- The City of Stuart pays 90% of employee level premiums for its base plan.

Family Level

- The average percent paid by the respondents for family level medical premiums was 67%
- The City of Stuart pays 81% of family level medical premiums for its base plan.

As coverage and deductibles vary, caution should be practiced when comparing premiums. Based on the study findings, Stuart offers slightly less towards employee level premiums but more towards family level premiums than its competitors.

Out-of-Pocket (OOP) Maximums

The range for OOP costs for individual level coverage In-Network was \$2,000 to \$5,000 and for family \$4,000 to \$12,000. Out-of-Network OOP maximums for individual level ranged from \$3,000 to \$7,350 and for family \$8,000 to \$14,700. Stuart's OOP maximums for both plans fall within the ranges found in the external market.

Health Savings Account / Health Retirement Account (HSA/HRA)

One-third of respondents stated they contributed funds towards employee HSA/HRA accounts in order to offset the costs of health insurance deductibles. The monetary amounts reported for contributions ranged from \$470 to \$1,500 per year. The City does not offer HSAs or HRAs but does, however, offer a Flexible Spending Account (FSA).

Other Benefits

The following is a list of additional benefits respondents offered their employees:

Additional Benefits Offered	
Accidental Death & Dismemberment Insurance	Leave Buy Back
Cell Phone & Cell Phone Discount	Life Assistance Program
Compensatory Time Carry-Over	Life Insurance
Critical Illness Insurance	On- Site Fitness Center
Deferred Compensation Plans	Pet Insurance
Employee Assistance Program	Prepaid Legal
Extended Illness Bank	Recreation Center Membership or Discount
Flexible Spending Account	Section 125
Hearing Exams and Hearing Aids	Short and Long-Term Disability Insurance
Health Retirement Account & Contribution	Tuition Reimbursement
Health Savings Account & Contribution	Uniform Payment
Health Insurance Opt-Out Payment	Voluntary Supplemental Benefits
Health Clinic	Wellness Programs

Standby Pay

70% of respondents reported offering Standby Pay to select employees. Departments and positions that receive Standby Pay included Dispatchers, On-call staff, Bargaining Unit employee, Utility employees, Street department employees, Water Utility employees, Laborers, Service Workers, Police, and Public Works. Standby Pay amounts ranged from 1 to 8 hours per day. A couple of respondents stated they paid different rates Monday through Friday versus weekends. Some responded stated they paid Standby Pay in weekly increments of \$75.00 per week or 5.25 hours/every two weeks.

Leave Types

Holiday Pay

The City of Stuart offers employees 11 paid Holidays (9 Holidays plus 2 floating Holidays) per year. According to the Bureau of Labor and Statistics (BOL) for the South Atlantic region

<https://www.bls.gov/ncs/ebs/benefits/2018/ownership/govt/table33a.pdf>, the average number of paid Holidays government employers offer per year is 11 days. Stuart's comparators also offer 11 paid Holidays annually on average. Respondents reported offering floating days, diversity days, and anniversary or birthdays as paid time off, which was included in the calculation.

Vacation Pay

The external market respondents offered Vacation Leave starting at 10 days of leave annually. The median number of Vacation Leave days was 22 days. The maximum reported Vacation Leave annual accrual amount was 25 days. The Bureau of Labor and Statistics shows that local government employers with 100 to 499 workers on average offer 12 to 22 Vacation Days per year dependent on the number of years of employment. The information can be found at the following link:

<https://www.bls.gov/ncs/ebs/benefits/2018/ownership/govt/table38a.pdf>.

BLS data was not available for Vacation Leave carry-over. The median carry-over of Vacation Leave Days from the custom external market survey was 44. The range for carry over was 35 days to one respondent who reported carry-over as uncapped.

Paid Time Off

Roughly 40% of respondents reported offering PTO. The number of paid days offered ranged from 18 to 28 days for the BLS South Atlantic region. The data can be found at the following link:

<https://www.bls.gov/ncs/ebs/benefits/2018/ownership/govt/table39a.pdf>.

The City offers PTO to all full-time employees and negotiates provisions with the IAFF and PBA. Details of each program can be found in the City's Employee Handbook or Collective Bargaining Agreements.

Sick Leave

According to the Bureau of Labor and Statistics <https://www.bls.gov/ncs/ebs/benefits/2018/ownership/govt/table35a.pdf>, the average number of annual Sick Days offered by State and Local government employers with 100 to 499 workers is 12 days. Respondents to Paypoint HR's external survey also had a median number of Sick Days of 12. Sick Leave carry over was reported as high as 120 days.

Phone Allowance

All respondents reported providing cell phones for positions that warrant them. Monthly stipends were also offered at 42% of respondents to employees for use of their personal phone. Cell phone stipends ranged from \$15 to \$100 per month. The average stipend was \$53 per month. In comparison, the City of Stuart offers \$40 to \$115 per month to eligible employees which is competitive.

Focus Groups

The purpose of the focus groups was to have employees share valuable firsthand knowledge and opinions of the existing Stuart pay structure. Each focus group generally lasted an hour and consisted of a Q & A session where Paypoint HR asked questions from a pre-set list of 10 questions. While the main point of the employee feedback is centered on classification and compensation, these topics naturally open discussion to a number of other factors. This is a normal communication pattern and the report addresses the topics as they presented themselves in the discussion. The City may want further consider exploring issues raised during the study focus groups.

On June 19th and 20th, 2019 Paypoint HR held 8 onsite focus group sessions with employees. All employees were invited to attend the focus group sessions and actual attendance was approximately 96 employees in total. Participation was strongly encouraged but voluntary. Employees who attended were given an acknowledgement form to sign that explained the ground rules for focus groups.

A copy of the list of questions is shown below:

1. Is your job description accurate?
2. Do you have an understanding of the City's goals?
3. What general trends/forces impact your and the City's success?
 - a. Economic
 - b. Regulatory
 - c. Cultural
 - d. Technology
 - e. Organizational Structure
 - f. Demographics
 - g. Political
 - h. Natural Environment
4. Who are the City's competitors for labor? What makes other Cities and Counties (or businesses) successful?
5. Has the City of Stuart had difficulty retaining, developing, motivating, and recruiting competent performers in any positions? If so, which one(s) and why?
6. Who are key sources of employees for the City of Stuart? Any recommendations?
7. Do you understand the compensation plan?
 - a. Is it motivating/fair?
 - b. Is it in line with the City's goals?
 - c. Does it use the right metrics?
 - d. Does it allow for advancement in your career ladder?
 - e. Is it competitive?
 - f. What does it recognize? Education, tenure, performance?

8. Does the City's work environment encourage the following:

- a. Personal growth,
- b. Team building,
- c. Praise for effort, not just outcomes, or,
- d. Kindness & caring?
- e. Other

9. Which do you prefer?

- a. Individual incentives
- b. Group incentives
- c. Individual & Group incentives

10. What recommendations for improvements do you have?

Employee Focus Group Responses:

A brief description of the comments made by focus group participants are summarized in the response section below. It is important to note that the views shared in this summary are not necessarily supported by Paypoint HR, nor are they fact checked for accuracy. While the information included in this portion of the study is qualitative in nature, it is important to include any "perceived impressions" of employees so that the City has information and can choose to communicate and clarify as they see fit. The information that may identify the commenter has been removed. The feedback obtained provides a much stronger foundation for the study than simply reading the information from handbooks, job descriptions, and employment agreements. The comments and suggestions received during these meetings were compared by session and by topic to look for patterns, red flags, best practices, and areas of opportunity. They are one component to the study.

While the Focus Group questions are established to uncover areas of improvement it is also an opportunity to uncover strengths within the organization that the City should strive to maintain. The City of Stuart had several areas where it stood out.

The employees of Stuart are proud of their City. They explained the City's geography on the Treasure Coast along the St. Lucie River attracted people to the area. They felt the community grew to offer amenities and services to meet the needs of the residents and visitors. Employees said that Stuart was a vibrant growing City with an improving economy. They explained that the City offered services found in other cities like emergency services, streets, parks and recreation, water, water treatment, sanitation, and recycling but that it was also a cultural hub. They were appreciative of the fact that the City was home to several parks & gardens, museums, quaint shops, restaurants, marinas, a hospital, an airport and other places of interest.

Employees enjoyed coming to work every day and felt they had created a community amongst their work unit peers. Employees felt they were kept busy and time at work went quickly. Several departments, including but not limited to, Public Works, Police, Fire, Community Services, and Parks & Recreation said their work culture was positive. They generally felt supported, encouraged, and respected by their supervisors. The supervisors

who communicated well with their employees and clearly defined expectations were seen as role models.

Employees said the City held high standards for performance and cited the fact that they had earned the Insurance Service Organization (ISO) 1 rating for fire protection, which was a multi department effort due to the high number of fire hydrants the City serviced. They also said the City's water treatment had recently installed an Ion Exchange system and was slated to install a Reverse Osmosis system.

In addition, employees were encouraged by an improved communication between staff and City Commissioners. They were encouraged by the fact the City thought enough of the staff, to conduct a pay study. Employees, who had worked in other government agencies, said it was easy for government officials to forget that they were not only representatives for their constituents but also employers. The employees mentioned that while there was always room for improvement, there was a sense of mutual respect between the Commission and employees.

The Human Resources department was complimented as doing a great job as team leaders. Employees felt HR let it be known they are a means for employees to solve problems, and assist with communication. Personnel said they had received customer service training to help serve the community. The Working on Wellness (WOW) program was said to be a positive initiative along with employee recognitions efforts such as birthday cards, anniversary milestones, and the summer picnic. There was an overall perception that HR was committed to create a kind and caring organization.

Job Descriptions

- Overall, employees felt their job descriptions were fairly accurate. Employees stated some of the job descriptions were vague, reverse engineered by someone who was unfamiliar with the work, or a work in progress due to turnover, but generally felt their primary tasks were covered.
- Staff felt having accurate job descriptions helped to set clear expectations of the work expected of them, held people accountable, and had the potential to reduce turnover by setting expectations.
- Employees expressed some concern that the job descriptions did not address workload, caseload, compliance, technology, administrative tasks, or paperwork.
- Some employees stated that job descriptions may lack the specific certifications and licenses required for a position as well as additional reporting requirements for those that held professional designations.
- Some participants believed their job descriptions should be updated to encompass the vast amount of knowledge required of them pertaining to the tools and equipment they used to keep the City, a 24-hour operation, in good working order. They described the title of Mechanic at other organizations' like, car dealerships, as

being specialized to a specific brand or type of equipment. Whereas, at Stuart, a Mechanic must know how to operate and fix equipment from many manufacturers of engines ranging in sizes from small hand-held tools to large industrial equipment. The same was said of the Ground Maintenance job title.

- Some positions would like to see their job descriptions updated to include the requirement to be on-call or stand-by to respond to phone calls for City related issues. Some positions said they could be on-call up to 12 weeks per year.
- Staff mentioned that because Stuart is a small organization, they may be asked to do tasks that normally fall outside of the scope of their positions. In addition, a few focus groups mentioned capable employees would inevitably pick up extra tasks which did not appear on those employees' job descriptions.
- Employees said since many Director level positions had changed in recent years; various jobs had been modified. Employees felt it would be important to update job descriptions accordingly for those positions.
- Some participants said there should be updates made to job descriptions as a result of an increase in community demands and social pressure. Positions mentioned concerning this topic were those in safety, emergency services, and customer service. Police specifically said they were having to do more and to be extra conscientious of their actions due to heightened social scrutiny of their industry.
- Some supervisory positions were said to also be tasked with doing field work which was not reflected in their job descriptions.
- Some employees suggested the City adopt a more fluid way to update job descriptions as many positions were newly created and others were continuously evolving.
- Code enforcement expressed concern regarding their position not being well understood by the community.
- Some positions said that items they were responsible for under their job description were not getting done due to lack of resources and staffing levels. The additional resources were said to be needed to address the growth the City has experienced.
- It was said that while job descriptions were accurate, the job titles may be outdated or not consistent with other similar organizations.

Goals

- Employees felt that having a clear understanding of the City's goals would help them in their day-to-day work by knowing what to prioritize and how to build a more cohesive team.
- Police, Fire, and Water Treatment said they had departmental goals. Emergency services said their goals centered around life safety. Some said that they were not sure how their departmental goals aligned with the City's goals.
- Some departments said they depended on outside funding or regulations, which could impact and shift their focus. Examples given were in Youth Services and Water Treatment.
- Personnel felt the City was focused on customer service which led to a general feeling of the City's primary goal being to serve the public.
- Some employees felt the City was reactionary as opposed to being proactive. They felt that complaints from residents, commuters, or tourists could cause the City to lose sight of the big picture and it was important for the City to maintain a chain of command and treat everyone equally.
- Personnel in some focus groups stated that it was difficult for them to meet their goals due to lack of resources and budgeting.
- Employees said that goals were created and altered according to City leadership and budgets and would like to have the City take time to communicate goals.

General Trends

a. Economic

- Employees said they would like to know more about the City's finances and financial decisions. They thought this would help them know what to prioritize and gain insight as to why certain projects took precedent. Specifically, they would like to know more about the decisions made to purchase property.
- Employees were interested in how property values, millage, and taxes impacted revenues during the focus group sessions. There seemed to be some confusion regarding the City's millage rate and recent changes.
- It was stated that the City is home to a large number of exempt properties for taxes. It was said properties valued under \$75,000, which was the basis for a Save Our Homes tax exemption, were not required to pay property tax. Employees said there was a number of retired residents who may be exempt from property taxes.

- Staff said that the City had recently annexed property north of the bridge, which was now being serviced by City employees.
- Employees said there was a low interest/interest free loan incentive program for residents to change from septic to City sewer connections. The program had been in greater demand than what was anticipated, and the City was trying to play “catch up” to meet the needs of the community. Staff said the expectation of residents was that the work would be completed within a month of a request. Employees felt the City should do a better job at communicating realistic expectations to citizens concerning the timeline of these projects.
- Employees mentioned seeing the local economy improve with new businesses and residents in the last 3 years, but that internally, they had not recovered in the areas of pay, resources, or staffing levels from the Great Recession of 2008 to 2010. Employees reported pay freezes which resulted in pay compression.
- Employees reported they were using outdated equipment and vehicles to service a community that has doubled in size. They also mentioned an increase in commuter traffic that has put a strain on resources for traffic related calls. Employees said that there were hundreds of thousands of drivers and commuters that go through the City each day, impacting the number and types of calls emergency services received
- Employees noted that the increase in construction both internally and externally has caused the existing staff to do more work leaving little opportunity for planning.
- Several focus groups felt burdened by the increase in health insurance costs.
- Some employees felt they were given more responsibilities but fewer resources to see them through. Employees said they were forced to be more resource conscious and frugal as a result of a tight budget and they expressed concerns over their ability to do a good job and be efficient without the proper tools.
- It was said the City was very project focused which was described as a positive.
- Staff expressed a lack of affordable housing in the community. They said it was difficult to buy property within Stuart, thus many individuals were forced to rent or live outside the City limits, especially those in entry-level positions.
- It was pointed out Stuart’s position of County Seat for Martin County and close proximity to County offices has exposed and emphasized the City’s inability to be competitive with the County when considering wages and benefits.
- Employees said that within the past year purchases of equipment/ fleet were delayed or cancelled.
- Some employees believed the City needed to do a better job at selling their river front location in order to attract additional residents and visitors to the area.

b. Regulatory

- City employees stated Stuart was subject to non-funded state and federal regulations that impacted them. For example, the following observations were made:
 - The water treatment plant needed improvements to meet Environmental Protection Agency (EPA) requirements which employees said has an estimated cost of \$16 million. This improvement will also require staffing and ongoing maintenance.
 - Staff mentioned equipment as being more costly to replace and purchase due to regulations placed on the City as compared to the private sector. Emergency services and commercial grade equipment for infrastructure throughout the City was said to be costly.
 - Police said that regulations regarding body cams, videos, confiscation of fire arms, risk protection orders, and the Marjory Stoneman Douglas incident have all impacted them and required additional attention and reporting.
- Employees said that they anticipated new regulatory changes that would also impact the City. Examples they mentioned included monitoring water, safety, fire hydrants, FEMA administration, public records requests, social media liability, technology, and weather events.
- Employees stated the City had completed a lot of work in reporting to FEMA but the City had not been reimbursed for that work.
- The City was said to be getting a new NextGen software for 911 calls. When the system is implemented employees said calls will come directly to Stuart instead of through Martin County. They thought this system might increase calls handled by dispatch which would mean the City would need an additional Dispatcher. The NextGen software was thought to be 4 years away from implementation.
- Employees said that not only did they need to be compliant with regulations but they needed to enforce regulations on businesses and residents. They gave the example of the zero-waste policy for parks and concessions and the upcoming policy for no plastic straws. They also referenced legalized medical marijuana and the growth of businesses in that industry.
- Additionally, state laws that applied to builders and developers were said to be self-governed and this autonomy was thought to be risky.
- Employees suggested the City review its preventative maintenance policy and keep it up to date so they could be proactive on maintenance and replacement of equipment and vehicles. Employees felt this would keep the City compliant but also be cost effective in reducing replacement costs.

- Due to regulations, staff felt a need to hire positions requiring certifications and a need to provide training and continuous education to support employees.
- Employees said they would like to know more about how fund-raising works for City departments. They cited the “boot” campaign for Fire and wanted to know how it applied to other departments that could use additional funding.

c. Cultural

- As stated previously, City employees were proud of Stuart and said that recently, they saw improvements with communication and relationships with various groups. They were pleased with the improved downtown area and the annexation of additional land/areas. They would like to see this positive momentum carry through into the future.
- Employees felt good communication was the key to a positive work environment. They were interested in knowing what other departments were doing and felt this knowledge would help the City develop a united workforce.
- Although employees said too many meetings were counterproductive, they enjoyed feedback meetings with upper level management. Employees felt the City could encourage participation at meetings by hosting them at various department buildings.
- Staff said they would like to have leadership visit them at worksites and for them to ask how they could provide assistance to the employees.
- In general, staff felt that the community supported their hard work which was appreciated.
- Employees expressed a disparity between union and non-union personnel which did not foster a team environment.
- Employees felt sensitivity training was a positive thing; however, there was an unintended consequence for some. They said they developed a fear of making small talk to foster relationships as something they said could be interpreted as offensive. As a result, personnel said they had limited their conversations to the point of deterring team and relationship building.
- Employees felt that because the City was small, they had more opportunity to communicate with upper level staff and noted those interactions to be positive for morale. It was felt this was a benefit not found in larger organizations and could be utilized by the City while recruiting new employees.
- Staff expressed concern for the lack of interest in the adoption of new ideas. They felt this mentality could prohibit efficiencies and future employee feedback.

- Employees enjoyed team building and the WOW program. They felt that some new concepts within the program could appeal to a wider range of employees. For example, the Public Works department may like more physically challenging or competitive activities while Fire and Police personnel would rather see the money for this program go towards safety and equipment.
- There was some criticism for the Life Saving recognition award as it was felt that the Fire department regularly administers Narcan to patients which is a life saving measure but not considered eligible for an award in the program. In addition, employees stated certain supervisors were better at reporting lifesaving acts than others causing an imbalance amongst employees who received those awards.
- Some departments stated they got along well, but sometimes felt a lack of support from their direct supervisors. They cited flawed City mechanisms used to deal with internal issues. Currently, employees said they are directed to address areas of concern with their direct Supervisors. Employees suggested an anonymous mechanism that allowed them to communicate areas of improvement or ideas further up the organizational chart as potentially helpful.
- Employees felt the turnover rate at the Director level impacted morale and would like to see less turnover in leadership positions.
- Some employees mentioned generational issues and difficulties supervisors faced when training new employees. They felt their supervisory roles had shifted more towards being a mentor or coach to employees.
- A few focus groups mentioned a lack of a mentorship program for individuals moving into supervisory/managerial roles. It was felt this had created problems for the individuals stepping into those positions and the employees they were in charge of overseeing.
- They felt there should be something in place for people who want to be promoted and to receive the additional education and training they need to be future leaders. Overall employees wanted to feel like the City had a career progression program.

d. Technology and Tools

- Staff described an overall need for the City to update technology and to be more proactive at updating existing systems. They were optimistic with the new IT Director and were hopeful the City would be open to new technology. The existing CAD system was said to be from the 1980's. They said there were delays in the CAD response times and documentation which makes it difficult to meet ISO standards.
- Employees wanted to be more involved in purchases regarding tools and technology since they were the ones who had to use the them. They wanted the City to purchase more than the basic applications, make sure that staff was sufficiently trained, and

ensure there was ample customer support readily available. Employees suggested the City create a committee to research technology purchases.

- Employees said they have had to be very resourceful as a result of the computer crash in April of 2019. They said they learned they could become too dependent on email and that direct communication was effective. They also learned they allowed email to consume too much of their time and would, in the future, allot specific times during the day to read and respond to emails.
- The Police Department (PD) expressed some concern over the decision to centralize IT. They understood why the decision was made but were concerned about the future response times during weekends, holidays and night shifts.
- PD said that in order to generate citations and reports they were forced to hand write them or use outdated dictation machines. Police attributed the frequency of hand-written reports to the lack of computers and printers in some of the patrol vehicles. In addition, police staff said hand-written reports took longer to process and reduced accuracy. Some staff expressed concern that soon, hand-written juvenile arrest records would no longer be accepted. PD also stated that not having printers in cars meant they could not create crash reports on-site.
- Code enforcement said there was only one ticket machine and employees had to share them during their shifts.
- The weather and heat was said to be a major factor for employees who worked outside. For instance, PD said their laptops often overheated, thus sometimes preventing them from completing work in a timely manner. Also, the Maintenance and Mechanic employees expressed they were often exposed to the elements and heat, suggesting that shade would be appreciated for protection. For some crews, they use pop-up tents, but had to set them up and take them down each day which they said was a hassle. Others, like the mechanic, said there was no building with an overhang or port where large equipment could be worked on without being exposed to the sun or rain. Therefore, some work had to wait for inclement weather to pass and equipment was left out in the elements.
- In the garage, there was no lift for equipment for fleet vehicles which meant the City used bottle jacks that were not as reliable or safe. In addition, this made work more difficult as work had to be completed laying down rather than standing.
- It was said the Fire department Patient Care Reports (PCR) were run through Martin County and the City pays \$30,000 per year for this service. It was felt that hardware used to run this system had to receive permissions from the County for changes. Employees described this as limiting since they felt they could not control their own equipment. For example, they said they could not put laptops into service without clearance from the County first.

- Safety and technology were said to go hand in hand with emergency services. For example, PD claimed there was a necessity for them to know where their Police Officers were at all times, which required both technology hardware and software.
- The Fire Department said they were not as up to date as most cities were regarding their tools and technology. Employees in the department said they had aging equipment that was prone to maintenance issues, such as a twenty-two-year-old engine.
- Community Development, GIS, Community Redevelopment Agency (CRA), Sanitation, and Utilities all felt their departments were not up to date with tools and technology. It was said GIS systems would be more efficient if there was the ability for residents to click on a parcel and get the status of that parcel and if ordinance numbers could be researched. Employees reported if those two updates were made to the GIS systems, then the number of calls would significantly decrease.
- The 10th Street Community Center said they were unable to book rentals electronically and are required to share offices and computers due to lack of space and resources. For example, they mentioned a lack of physical office space for each leader to have their own desk. It was also mentioned the Community Center had redundancy in its software which did not interface and they lost information from one program to another.
- Many departments claimed they were unable to process electronic credit card payments.
- Employees said that there was an expectation for certain technology and tools to already be in place from the new hires and younger employees. The City's lack of certain tools and technology was considered to be a hindrance to recruiting qualified employees.

e. Organizational Structure

- Employees were encouraged by the new City Manager and felt there was more open communication. Employees said the City Manager set the precedent for others to follow.
- Employees expressed that there usually was an opportunity for 2-way communication between front line staff and leadership. However, staff felt they could approach City leadership more easily now and that there was a new level of transparency that was established between the two.
- Employees in the Public Works department feared negative repercussions for making recommendations to supervisors. However, staff said it depended on supervisor as some were more receptive to suggestions and advice than others.

- Employees thought the City was a flat organization with quick decision making and an ability for Directors to communicate easily. However, some employees thought decisions were sometimes made more slowly due to budgetary restraints.
- PD Communications expressed a desire for a reporting relations structure between them and the Police Department since much of what they do is directly related. They said they have no single source for direction within the PD so a chain of command would be helpful.
- The PD said that they do not have the hazmat or aviation areas of specialty and therefore don't attract candidates that are seeking that type of experience. They also said the Sergeants do what Lieutenants do and the Corporals do what Sergeants do when comparing to other organizations. Is this just a title preference issue?
- Employees enjoyed working for a small organization and liked the ability to hold multiple roles which would not happen in a larger organization where positions are more specialized. They said it helped them keep in touch with their work and see where they fit in the bigger picture. On the other hand, others said it made it more difficult to complete all of their assigned tasks in a day which created a back log.
- Some employees said they were hesitant to volunteer for tasks because they did not want to get put in charge of those tasks forever.
- The Fire Department (FD) expressed a desire to have a Fire Marshall for prevention and thought this may relieve the Fire Chief of some of his responsibilities and give him more time for planning and administrative functions. They also would like to have a dedicated Training Chief.
- Employees hoped that the new IT Director would be given the latitude and support to make sweeping changes to improve the City's technology.
- Employees said that in the past, the City was good about balancing the needs of everyone and did not lay anyone off during the recession. This was appreciated by the employees.
- The 10th Street Community Center employees said they shared an office with Community Services which was viewed as being inconvenient. It was suggested that they would be better served if their division were under Public Works instead of Community Services.
- Employees felt that the City was understaffed when considering the growth of Stuart and the associated workload that came with that growth.

f. Demographics

- It was said that the City had done a good job hiring a diverse workforce to represent the changing demographics of the community. Employees believe there to be more

Latinos in Stuart than there were ten years ago which meant the City had to provide more translation resources.

- Employees said there was a larger homeless population now than in the past and attributed it to the annexation of new areas and a lack of affordable housing.
- Employees stated that the City had been experiencing growth in the number of assisted living facilities, nursing homes, and sober living homes. This demographic was believed to have a direct impact on the number of calls to emergency services. Emergency Services staff claimed there was an influx of non-emergency calls which they felt abused emergency response system resources.
- Employees thought the sober living homes were a product of insurance companies building facilities in Florida due to the low building and maintenance costs.
- Employees felt the City peak season used to be Labor Day to Easter, but felt there was no longer a peak season. Employees felt Stuart had become constantly busy with visitors.
- There was said to be a big demand for affordable childcare. It was perceived by staff that childcare helped promote positive development for kids and that the City had picked up that responsibility rather than the County or school system. Staff said the City's program was primarily grant funded except for the building, though they did not charge any fees for the program.
- Employees said that the City has catered to a few residents who have a tendency to complain and call the Commission directly. Employees felt the City should redirect those individuals to the normal chain of command and treat everyone equally.
- Staff claimed there was a decrease in bar traffic and nightlife. They said The City had become more of a retirement community with people coming in for doctors' visits and medical reasons, which has ultimately altered the workload for emergency services staff.

g. Political

- The staff said that the City's goals and culture were subject to change greatly depending on who was in office. The current Commission was said to be competent and open to collaboration. However, employees felt they were impacted by any Commission change because priorities, ideas, and goals shifted based on who was elected and in office.
- They said leadership changes were reflected in the budget. In addition, employees stated smaller budgets put a strain on the Directors to explain the consequences of the decisions being made regarding a projects' priority and importance to the Commission. Employees indicated some Directors were better at this than others.

- PD felt that if they made a mistake in their job there was the potential for negative press and negative feedback from the community.
- Employees said that Commissioners were elected based on name recognition and popularity on social media rather than experience or knowledge. Employees stated Commissioners were challenged with making tough long-term decisions that directly impact sustainability.

h. Natural Environment

- It was felt that due to the City's close proximity to the river and their reliance on tourism, the City was at risk of losing revenues if a natural disaster occurred. Stuart was said to be susceptible to hurricanes, rain, flooding, tornadoes, lighting strikes, algae blooms, pollution, fires, and waterway concerns.
- Employees said they were directly impacted by weather as they had to work in the elements and be trained to respond to natural disasters.
- In Public Works, they were tasked to maintain the functionality of power and water during emergencies.
- Although the City had supported FEMA by keeping records during hurricanes, they had yet to be reimbursed for their help.
- Employees said the County and City provided shelters for employees during natural disasters, but did not accept pets into those shelters or provide an alternate place for pets to take shelter.
- Employees felt the City should have lightning rods in buildings that were high risk, such as the childcare facility.

Stuart's Competitors for Labor

- The counties described as competitors to Stuart for labor included Indian River, Palm Beach, Martin, Okeechobee, and St. Lucie Counties. Other specific competitors named were Fort Pierce and the Town of Jupiter.
- It was felt that the City competed with local private sector employers such as auto dealerships, auto shops, John Deere Everglades, the Hospital, construction, landscaping, HVAC contractors, and engineering firms.
- The Fire Department said all local metro fire departments were competitors as well as municipalities that did not have a residency restriction for hiring in place. Specifically, they mentioned Palm Beach County Rescue.

- Competitors were said to have better technology, equipment, and vehicles. They were said to have less red tape, be more specialized in their job requirements, have less workload, have better benefits like vacation balances at time of hire, and have higher pay.

Difficult to Retain, Develop, Motivate, and Recruit Positions

- Several focus groups mentioned the lack of affordable housing, as well as limited day care options within the City of Stuart as a challenge for recruiting and retaining employees.
- Specific positions described as being difficult for the City to find and hold on to were the following:

Mechanic, Diesel Mechanic, Routine Mechanic, Turf and Grounds Mechanic, Maintenance, law Enforcement, Seasonal Workers, Part-time Workers, Collections, Distribution, Laborers, Skilled Trades, HVAC, Fire Inspector, Building Inspectors, Entry Level positions, Code Enforcement, Firefighters and Paramedics.

- Employees claimed they could receive more certification pay at other organizations and companies, thus when employees received new training and certification, they were likely to leave for another organization/company. This created a reputation of Stuart being a stepping-stone organization.
- It was said that due to a low response rate to posted positions, the City had lowered its standards in hiring. Consequently, employees believed this had hurt the City's quality of work and created frustration for the high performing employees.
- Employees suggested better screening, training, and mentorship for new hires.

Key Sources for Employees

- The City currently posts positions on its website and utilizes temporary agencies for some positions but employees were not sure what other media sources were being used for recruiting.
- Employees felt the City waited too long to post positions and should start looking or creating a succession plan when an employee announces their retirement or that they're leaving. Employees felt the hiring process took a long time and it seemed the City was in no hurry to replace vacancies.
- Employees suggested the state's labor department, temporary agencies, online sources, vocational technology schools, college graduates, college job fairs, private sector permit runners, and internships as possible sources for good candidates. Online sources mentioned were Indeed, LinkedIn, and Governmentjobs.com.

- Police candidates were said to come from the Police Academy.
- Employees felt that the no-smoking policy was positive but that for some of the more difficult to recruit positions and blue-collar positions, it was unrealistic.

Compensation Plan

- Employees felt they understood the compensation plan but that it was not motivating. They said the plan had been frozen for a number of years due to the economy, which had caused more senior staff to be stagnant and not competitive with the market. They said the City no longer compensated for longevity.
- Employees were not sure what measurements were used, other than performance, to increase pay.
- Employees felt pay increases were not keeping up with the market. The only increases employees said they received were an across the board of 2% this year and a performance review “Appreciation Lump Sum” of up to 2% over the last few years. There seemed to be some confusion regarding how the “Appreciation Lump Sum” was administered with regards to payout and whether or not it was a pensionable benefit.
- Employees expressed a desire for clarification in the performance review system as there was confusion in how the scores were applied. Employees explained they thought that those who scored good, better, or best received the same merit amount, thus eliminating any incentive to work harder.
- Employees felt increases in pay were not keeping up with the increase in benefit costs.
- Employees want to see more advancement opportunities, pay for certification and education, more objectivity in performance reviews, and the ability to take time for training and education.
- Employees wanted to see a vacation balance upon date of hire or within a few weeks. Employees thought this would be beneficial for recruiting qualified candidates to Stuart.
- Employees said the City’s policy for benefits to be effective on the first of the month following 60 days of employment had been misinterpreted by some as a 3 month wait time. Whether the time was 60 days or 90 days, they described the elimination period as seeming longer than the typical eligibility wait time for benefits.
- Employees felt that non-union employees were forgotten about when it came to getting increases in pay or benefits. They felt that while they appreciated the

personal day for their birthday, they only had 30 days to use the leave whereas for union employees' the paid leave equivalent for birthday pay offered more flexibility as to when it could be used.

- Employees appreciated that the City paid into retirement for Part-time employees.
- Employees also liked the anniversary recognition from the City Commission. They said that it sent a positive message but also noted that if a Commissioner was late or absent from recognition ceremonies, it could be interpreted that the Commission member didn't feel it was important.
- Some positions were seen as having too low of pay to take on extra responsibilities such as supervisory tasks.
- Others thought it took longer to reach leadership roles from within the City and the work to get to a supervisory position was physically hard on the body making it easy to burn out.
- Employees liked the City's education policy but felt they could not use leave time to take classes and said that it depended on the Department Head on whether or not it was approved. Employees said the City used to pay for training and conferences but claimed that privilege had gone away.
- A few employees thought the former step program that was based on longevity was a good system.
- Police and Fire said they felt having to work on days set aside to respect those that have served or patriotic days was counterintuitive and took time away from their families. They said they had to work on Independence Day for example.
- Employees felt residents supported them but were reluctant to pay taxes. They hoped the community could rally more behind them and the City services they provide.

Work Environment

- Employees felt the work environment at Stuart was positive and was much better than other municipalities, especially larger ones. They felt there was a good balance of professionalism and support. Some said they felt Stuart had a "family" feel and thought it was a selling point. Others said it seemed the vision of the City was to be kind and caring.

- Staff said while there was still room for improvement on communication, they said they saw the City making an effort to improve. One area they thought could get better was with making sure items were conveyed and understood throughout the ranks and suggested a follow up to verify understanding.
- Employees said the City promoted work-life balance and personal growth.
- Employees liked the wellness program, employee recognition, and team building exercises hosted by the City and would like to see more opportunities to lift one another up for good performance.
- Employees appreciated the training for customer service to try to find middle ground when enforcing City policies. They said they needed all the help they could get when dealing with the public.
- Personnel stated that the work culture depended on the supervisors within the work unit.
- Non-union employees claimed they were tired of having to prove their worth and believed all employees should be treated as equals.
- Some focus groups stated the City often took the side of the resident when a complaint occurred without first listening to the employees' input. Employees felt they were being stretched thin trying to appease all citizens and the City should follow the chain of command and treat everyone the same.
- Employees were generally proud of Stuart's City Hall and felt it was a good recruiting tool since it was one of the main images people thought of when they thought about Stuart's City government. It was also where they went to apply, interview, and onboard. However, employees thought City Hall could be used more for team building as offsite departments said there was a tendency for them to feel disconnected from City Hall. They felt City Hall office staff enjoyed more amenities than the rest of the City and sharing the space was a way providing equity in the use of City assets.
- Staff felt they really stepped up and worked well together to take responsibility for filling the gaps when the computers were down and were proud of getting through such a difficult time.
- Employees were appreciative when the City took the time to explain why decisions were made especially during times of stress.

Incentive Types

- Seventy percent of the focus groups felt performance incentives should be a combination of individual and group performance. They felt a combination encourages the Team Leader to make the team better. They said work gets done by the group and no one person fixes the problem. They felt accountability was the only way to make it fair and that if someone was not performing to standards over time that they needed to be addressed. They felt a group component could make sense for some positions but not all and could be added to the existing performance review.
- Employees said that no one wants to get ahead without others and they needed to lift each other up.
- Some were concerned about the objectivity of performance reviews across the organization stating that the review could depend on the Supervisor conducting it.
- Some upper level employees wanted the incentives to go to the blue-collar workers. It was said they had been overlooked for a long time and were the primary wage earners for their family. The blue-collar workers were said to have uplifting attitudes about coming to work each day and were the framework the City was built on.

Employee Ideas

- It was suggested the City consider conducting a staffing level study to better distribute workloads because what motivates people is their time and money and the City needed to find a balance.
- Employees wanted to see improved 2-way communication to get ideas from those on the front lines.
- Inform employees as to why decisions were made and issues resolved so they could get behind the initiative.
- Employees would like to see an effort to circle back with them to make sure communication was clear and understood.
- Personnel felt that the City needed to do a better job at treating everyone equally whether it was an internal employee or external customer.
- Code Enforcement would like more support from the City to gain community recognition, respect, and support.
- Employees thought the City could use exit interviews to get ideas of how to improve retention rates.

- Employees suggested employee mentorship programs.
- Personnel would like to participate in the decision process even if it was simply asking them to participate in a survey or be part of a committee.
- Staff suggested the City consider joining another government organization to offer collective benefits.
- Employees would like to have the option for cell phone reimbursement.
- Personnel would like to see more effort in keeping existing staff so they aren't constantly tasked with training new hires. Staff noted when one person was training a new hire, the rest of the staff was down an employee. Employees thought there was an area of improvement regarding the ability to receive pay for earned certifications and licenses.
- Personnel would like the City Commissioners to keep in mind they are not only representatives for residents but also in charge of making sure the City's' employees were well managed and treated fairly.
- They would like to have Commissioners see what they do each day and ask what they can do to help.
- Communication was important to employees. They wanted to reinstate the newsletter, have morning announcements, have the opportunity to have small group breakfast meetings or town hall sessions with the City Manager to find out what is going on and to voice their opinions.
- It was felt the City should make affordable housing a priority.
- Employees would like to see more formal policies on items like breaks and lunches.
- Staff said there was a plan in place for preventative maintenance and replacement for City facilities and fleet but that is was not always adhered to as planned. Employees were not clear as to why resources weren't set aside for it at intended and thought additional time and effort could be assigned to this area.
- Personnel thought the City implemented good ideas like the safety incentive committee. However, there was a concern raised that this type of initiative may not promote the reporting of injuries or incidents, which they believed was not intended.
- Employees thought the City could do a better job of providing correct safety equipment, such as appropriate work shoes for Inspectors.
- Grants were said to be another opportunity for the City and believed someone should be focused on grant writing.

Comparators

Purpose

To determine economically comparable organizations for inclusion in the external market study by comparing economic metrics of the City of Stuart to those of similar communities.

Required Comparators

City of Cocoa, City of Fort Pierce, City of Jupiter, City of Okeechobee, City of Port St. Lucie, City of Punta Gorda, City of Titusville, City of Vero Beach, City of West Palm Beach, Fort Pierce Utility Authority, Martin County, and St. Lucie County.

Methodology

The goal was to understand how each of the forty-three (43) similar communities compared with the City of Stuart. Six (6) metrics that were chosen for evaluation were population, unemployment rate, labor force participation rate, median household income, cost of living adjustment, and median housing price. Each metric was assumed to be equally important and were examined individually and in combination.

A statistic was produced for each metric by first taking the absolute value of the difference between the metric for a similar community and the same metric for the City of Stuart, for example, the difference between the population of the Town of Jupiter and the City of Stuart. The difference was then divided by the standard deviation to understand how the difference varied for each similar community in relation to the sample population of forty-three (43) communities as a whole.

If any of the metrics had a value in excess of three standard deviations, then the community was considered to not be a good comparator for the City of Stuart – highlighted in **red** below. Comparators highlighted in **green** were perceived by the client as a valid comparator.

From a statistical perspective, Chebyshev's Inequality Theorem indicates that 88.8% of all data values would be within three (3) standard deviations of the mean for a generic distribution. If a normal distribution exists, then values less than three (3) standard deviations account for 99.73% of the population. The choice of comparison is therefore statistically sound and appropriate.

A summary table of these calculations is presented in the following tables. (Sample calculations are also presented.)

Table 2 – Potential Comparators – Florida Cities

Auburndale	Haines City	New Smyrna Beach	Sunny Isles Beach
Bartow	Hialeah Gardens	North Palm Beach	Sweetwater
Belle Glade	Jupiter	Okeechobee	Titusville
Casselberry	Lake Wales	Opa-locka	Vero Beach
Cocoa	Lake Worth	Palm Springs	West Melbourne
Cocoa Beach	Lantana	Port St. Lucie	West Palm Beach
Dania Beach	Lighthouse Point	Punta Gorda	West Park
Edgewater	Maitland	Riviera Beach	Wilton Manors
Fort Pierce	Miami Lakes	Sebastian	Winter Park
Greenacres	Miami Springs	South Miami	

Table 3 – Potential Comparators – Florida Counties

Hendry County	Martin County	Okeechobee County	St. Lucie County
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For reference:

Population

Florida - 20,278,400 United States - 321,368,864

Median Housing Price (MHP)

Florida - \$178,700 United States - \$193,500

Median Household Income (MHI)

Florida - \$50,883 United States - \$57,652

Cost of Living Adjustment (COLA)

Florida - 96.7 United States - 100

Unemployment Rate (U Rate)

Florida - 4% United States - 4%

Labor Force Participation Rate (LFP Rate)

Florida - 59% United States - 63%

Table 4 - Economic Data of the City of Stuart and Potential Comparators

Community	Population	MHP	MHI	COLA	U Rate	LFP Rate
Stuart	16,240	\$130,700	\$42,210	97.0	4%	55%
Florida Cities						
Auburndale	14,958	\$148,700	\$47,441	96.4	4%	59%
Bartow	18,705	\$102,400	\$46,938	87.0	4%	56%
Belle Glade	19,175	\$111,400	\$25,873	91.8	9%	57%
Casselberry	27,087	\$110,400	\$42,438	96.4	5%	63%
Cocoa	17,748	\$106,100	\$32,685	91.5	6%	57%
Cocoa Beach	11,489	\$292,200	\$54,183	113.3	3%	47%
Dania Beach	31,526	\$174,700	\$42,936	105.1	7%	66%
Edgewater	21,620	\$134,300	\$47,133	95.4	3%	52%
Fort Pierce	44,248	\$91,400	\$28,025	93.1	5%	53%
Greenacres	39,827	\$136,600	\$46,681	99.9	5%	66%
Haines City	22,826	\$112,600	\$35,696	93.6	4%	55%
Hialeah Gardens	23,834	\$160,500	\$47,282	104.1	3%	65%
Jupiter	62,373	\$328,900	\$79,731	121.0	3%	64%
Lake Wales	15,401	\$134,100	\$40,499	94.4	6%	55%
Lake Worth	37,354	\$165,600	\$36,321	101.3	7%	66%
Lantana	11,240	\$164,600	\$47,777	100.2	6%	67%
Lighthouse Point	11,042	\$453,600	\$80,604	136.1	2%	61%
Maitland	17,066	\$320,700	\$66,502	116.6	3%	67%
Miami Lakes	31,032	\$345,400	\$72,545	123.6	3%	65%
Miami Springs	14,453	\$339,500	\$58,605	116.7	2%	68%
New Smyrna Beach	25,103	\$230,800	\$52,953	106.7	2%	42%
North Palm Beach	12,749	\$277,600	\$59,905	115.2	2%	56%
Okeechobee	5,596	\$102,900	\$38,810	91.4	3%	53%
Opa-locka	16,426	\$106,400	\$16,271	95.5	7%	50%
Palm Springs	24,455	\$111,500	\$39,660	99.1	6%	68%
Port St. Lucie	178,778	\$162,700	\$54,046	100.5	4%	59%
Punta Gorda	18,656	\$296,900	\$57,789	111.6	4%	33%
Riviera Beach	34,093	\$156,300	\$42,840	101.7	7%	63%

Community	Population	MHP	MHI	COLA	U Rate	LFP Rate
Sebastian	23,923	\$157,200	\$49,655	97.9	3%	46%
South Miami	12,255	\$480,700	\$62,305	131.5	8%	67%
Sunny Isles Beach	22,175	\$323,700	\$52,355	122.1	2%	56%
Sweetwater	20,989	\$139,000	\$36,436	105.3	3%	61%
Titusville	44,984	\$112,000	\$42,561	92.9	5%	54%
Vero Beach	16,261	\$225,900	\$40,771	103.7	4%	53%
West Melbourne	20,768	\$190,600	\$59,464	104.0	4%	56%
West Palm Beach	106,805	\$218,200	\$49,054	107.3	6%	65%
West Park	14,960	\$155,600	\$40,235	104.0	7%	67%
Wilton Manors	12,407	\$301,900	\$57,368	115.2	3%	67%
Winter Park	29,922	\$371,300	\$68,078	121.3	2%	57%
Florida Counties						
Hendry County	39,064	\$79,700	\$37,966	85.8	5%	60%
Martin County	155,719	\$233,000	\$55,588	107.0	3%	52%
Okeechobee County	40,228	\$89,900	\$39,059	88.8	4%	48%
St. Lucie County	298,763	\$150,700	\$47,132	98.3	4%	54%

Table 5 – Statistics of Potential Comparators

Community	Population	MHP	MHI	COLA	U Rate	LFP Rate
Florida Cities						
Auburndale	0.02	0.18	0.39	0.05	0.00	0.52
Bartow	0.05	0.28	0.36	0.84	0.00	0.13
Belle Glade	0.06	0.19	1.23	0.44	2.77	0.26
Casselberry	0.21	0.20	0.02	0.05	0.55	1.03
Cocoa	0.03	0.24	0.72	0.46	1.11	0.26
Cocoa Beach	0.09	1.58	0.90	1.37	0.55	1.03
Dania Beach	0.29	0.43	0.05	0.68	1.66	1.42
Edgewater	0.10	0.04	0.37	0.13	0.55	0.39
Fort Pierce	0.53	0.38	1.07	0.33	0.55	0.26
Greenacres	0.45	0.06	0.34	0.24	0.55	1.42
Haines City	0.12	0.18	0.49	0.29	0.00	0.00
Hialeah Gardens	0.14	0.29	0.38	0.60	0.55	1.29
Jupiter	0.87	1.94	2.83	2.02	0.55	1.16
Lake Wales	0.02	0.03	0.13	0.22	1.11	0.00
Lake Worth	0.40	0.34	0.44	0.36	1.66	1.42
Lantana	0.09	0.33	0.42	0.27	1.11	1.55
Lighthouse Point	0.10	3.16	2.89	3.30	1.11	0.77
Maitland	0.02	1.86	1.83	1.65	0.55	1.55
Miami Lakes	0.28	2.10	2.29	2.24	0.55	1.29
Miami Springs	0.03	2.04	1.24	1.66	1.11	1.68
New Smyrna Beach	0.17	0.98	0.81	0.82	1.11	1.68
North Palm Beach	0.07	1.44	1.33	1.53	1.11	0.13
Okeechobee	0.20	0.27	0.26	0.47	0.55	0.26
Opa-locka	0.00	0.24	1.95	0.13	1.66	0.64
Palm Springs	0.16	0.19	0.19	0.18	1.11	1.68
Port St. Lucie	3.08	0.31	0.89	0.30	0.00	0.52
Punta Gorda	0.05	1.63	1.17	1.23	0.00	2.84
Riviera Beach	0.34	0.25	0.05	0.40	1.66	1.03
Sebastian	0.15	0.26	0.56	0.08	0.55	1.16
South Miami	0.08	3.43	1.51	2.91	2.22	1.55

Community	Population	MHP	MHI	COLA	U Rate	LFP Rate
Sunny Isles Beach	0.11	1.89	0.76	2.12	1.11	0.13
Sweetwater	0.09	0.08	0.44	0.70	0.55	0.77
Titusville	0.54	0.18	0.03	0.35	0.55	0.13
Vero Beach	0.00	0.93	0.11	0.56	0.00	0.26
West Melbourne	0.09	0.59	1.30	0.59	0.00	0.13
West Palm Beach	1.71	0.86	0.52	0.87	1.11	1.29
West Park	0.02	0.24	0.15	0.59	1.66	1.55
Wilton Manors	0.07	1.68	1.14	1.53	0.55	1.55
Winter Park	0.26	2.35	1.95	2.05	1.11	0.26
Florida Counties						
Hendry County	0.43	0.50	0.32	0.94	0.55	0.64
Martin County	2.64	1.00	1.01	0.84	0.55	0.39
Okeechobee County	0.45	0.40	0.24	0.69	0.00	0.90
St. Lucie County	5.35	0.20	0.37	0.11	0.00	0.13

Sample Calculation

Population Statistic

Maximum Population = 298,763 (St. Lucie County)

Minimum Population = 5,596 (Okeechobee)

Jupiter Population = 62,373

Stuart Population = 16,240

Sample Average = 38,280

Sample Standard Deviation (s) = 52,851

$$Statistic = \frac{|Jupiter - Stuart|}{s}$$

$$Statistic = \frac{|62,373 - 16,240|}{52,851}$$

$$Statistic = 0.87$$

Benchmark Positions

Benchmark positions are normally chosen to reflect a broad spectrum of class levels. The positions that are selected normally include classes that are most likely to be found in other similar agencies and will therefore provide a sufficient and valid sample for analysis.

Benchmark positions are selected to encompass the entire range of positions from the beginning of the pay ranges to the end and equally interspersed among the pay scale.

In Table 6 through Table 9, the benchmark positions used in the external survey are presented and marked in **green**. From this list of benchmark positions, all job titles employed by the City were examined.

Table 6 – Benchmark Positions – Fire Rescue

	Job Title		Job Title
B22	Fire Rescue Battalion Chief	X29	Fire Chief
B22	Fire Rescue Battalion Chief Training/Logistics		

Table 7 – Benchmark Positions – Police Department

	Job Title		Job Title
X24	Police Captain	X29	Police Chief

Table 8 – Benchmark Positions – Hourly

	Job Title		Job Title
H01	Custodian	H12	P/T Crime Analyst
H01	Laborer I	H12	P/T Police Dispatcher
H04	Groundskeeper	H12	Payroll Specialist
H04	Laborer II	H12	Police Dispatcher I
H04	P/T Leisure Driver	H12	Team Leader I
H04	Sanitation Worker	H12	Utility Maintenance Mechanic
H05	Equipment Operator I	H13	Accounts Payable Specialist
H05	Nursery Worker	H13	Civilian Enforcement Officer
H05	P/T Lead Leisure Driver	H13	Human Resources Specialist

	Job Title
H05	P/T Office Assistant
H07	On Call Recreation Leader
H07	P/T Athletic Coordinator
H07	P/T Parking Enforcement Specialist
H07	P/T Recreation Leader
H08	Afterschool Program Leader
H09	Customer Service Representative I
H09	Fiscal Assistant I
H09	Maintenance Mechanic
H09	P/T Customer Service Representative I
H09	P/T Fiscal Assistant
H09	Permit Technician
H09	Sanitation Equipment Operator I
H09	Utility Service Worker II
H09	WTP Operator Trainee
H10	Customer Service Representative II
H10	Sanitation Equipment Operator II
H10	Senior Maintenance Mechanic
H10	Special Events & Tourism Specialist
H11	Customer Service Representative III
H11	Logistics & Support Technician
H11	Meter Reader
H11	System Technician
H11	Treatment Plant Operator I
H11	WWTP Operator I
H12	Business Tax Technician
H12	Division Assistant

	Job Title
H13	Team Leader I - Tram Services
H13	Treatment Plant Operator III
H13	Water Distribution System Specialist
H13	Water Reclamation System Specialist
H13	Water Systems Specialist
H13	WWTP Operator III
H14	Infrastructure Location System Specialist
H14	Police Dispatcher II
H15	Administrative Office Coordinator - CS
H15	Assistant to City Clerk
H15	Customer Service Supervisor
H15	Laboratory Technician
H15	LAN Systems Specialist
H15	P/T Behavioral Program Specialist
H15	Police Dispatch Supervisor
H15	Procurement Specialist
H16	Diesel/Gas Mechanic
H16	Executive Secretary to Public Safety
H16	Fire Inspector / Investigator
H16	Public Works Administrative Coordinator
H16	Public Works Inspector
H17	Accountant
H17	Building Inspector
H17	Executive Assistant to City Manager
H17	Instrument/Ctrl/SCADA Specialist
H18	Civil Enforcement Supervisor
H19	Paralegal

Table 9 – Benchmark Positions – Salaried

	Job Title		Job Title
S13	Youth Intervention Counselor	S21	Community Services Division Manager
S14	Admin & Program Supervisor	S22	Field Services Manager
S14	Recreation Programs Supervisor	S22	Plant Services Manager
S17	Program Manager	S22	Sanitation & Fleet Manager
S18	Community Affairs Liaison	S23	CRA Administrator
S18	Human Resources Analyst	S23	Deputy Public Works Director
S18	Software Application Specialist	S24	Financial Services Assistant Director
S18	Systems Analyst	S25	Assistant Public Works Director/City Engineer
S18	Team Leader II	S26	City Clerk
S19	Information Systems Coordinator	S26	Community Services Director
S19	Senior Accountant	S26	Human Resources Director
S19	Senior Planner	S27	Building Official
S20	Network Specialist	S27	Information Services Director
S20	Team Leader III	S28	Development Director
S21	Building Maintenance Coordinator	S29	Public Works Director
S21	Capital Projects Coordinator	S31	Financial Services Director

Salary Schedules & Baseline Analysis

Current Salary Schedule – Fire Rescue Non-Bargaining Employees (Leadership)

The current salary schedule for Fire Rescue Non-Bargaining Employees (Leadership) can be found in Table 10. Summary statistics are presented in Table 11. Battalion Chiefs (in current Grade B22) work 2496 hours per year, and the Fire Chief (in current Grade X29) works 2080 hours.

Spread measures the percentage difference between the maximum and minimum salary for a position. It is also an indication of the lateral progression available to an employee within their job title. A narrow spread often leads to wage compression as the maximum salary is quickly achieved. A narrow spread can also lead to low morale and high turnover as economic advancement is limited.

The salary schedule from Table 10 has an inconsistent spread ranging from 65.0% to 72.2% as is shown in Table 11. It is important that the spread is consistent amongst all employees so that all positions have a relatively equal advancement opportunity.

Table 10 – Current Salary Schedule – Fire Rescue Non-Bargaining Employees

Current Grade	Hourly Min	Hourly Mid	Hourly Max	Annual Min	Annual Mid	Annual Max
B22	\$23.99	\$32.66	\$41.32	\$59,888	\$81,516	\$103,143
X29	\$38.82	\$51.43	\$64.05	\$80,740	\$106,981	\$133,221

Table 11 – Current Spread and Ladders – Fire Rescue Non-Bargaining Employees

Current Grade	Spread	Min Ladder	Mid Ladder	Max Ladder
B22	72.2%	-	-	-
X29	65.0%	34.8%	31.2%	29.2%

Ladders define the percentage salary difference between consecutive groups of job titles. Ladders can be used to differentiate employees with different knowledge, skills, and abilities and motivate career advancement. As is shown in Table 11, the ladders are inconsistent, ranging from 29.2% to 34.8%. It is recommended that the ladders be consistent between grades.

Current Salary Schedule – Police Department Non-Bargaining Employees (Leadership)

The current salary schedule for Police Department Non-Bargaining Employees (Leadership) can be found in Table 12. Summary statistics are presented in Table 13. Police Captains (in current Grade X24) and the Police Chief (in current Grade X29) work 2080 hours per year.

The salary schedule from Table 12 has an inconsistent spread ranging from 56.0% to 65.0% as is shown in Table 13. It is important that the spread is consistent amongst all employees so that all positions have a relatively equal advancement opportunity. As is shown in Table 13, the ladders are inconsistent, ranging from 25.3% to 32.5%. It is recommended that the ladders be consistent between grades.

Table 12 – Current Salary Schedule – Police Department Non-Bargaining Employees

Current Grade	Hourly Min	Hourly Mid	Hourly Max	Annual Min	Annual Mid	Annual Max
X24	\$30.98	\$39.85	\$48.32	\$64,429	\$82,891	\$100,514
X29	\$38.82	\$51.43	\$64.05	\$80,740	\$106,981	\$133,221

Table 13 – Current Spread and Ladders – Police Department Non-Bargaining Employees

Current Grade	Spread	Min Ladder	Mid Ladder	Max Ladder
X24	56.0%	-	-	-
X29	65.0%	25.3%	29.1%	32.5%

Current Salary Schedule – Non-Bargaining Hourly Employees

The current salary schedule for Non-Bargaining Hourly Employees can be found in Table 14. Summary statistics are presented in Table 15. Hourly employees nominally work 2080 hours per year.

The salary schedule from Table 14 has an inconsistent spread ranging from 48.1% to 48.6% as is shown in Table 15. It is important that the spread is consistent amongst all employees so that all positions have a relatively equal advancement opportunity. As is shown in Table 15, the ladders are inconsistent, ranging from 4.7% to 5.2%. It is recommended that the ladders be consistent between grades.

Table 14 – Current Salary Schedule – Non-Bargaining Hourly Employees

Current Grade	Hourly Min	Hourly Mid	Hourly Max	Annual Min	Annual Mid	Annual Max
H01	\$10.10	\$12.54	\$14.99	\$21,014	\$26,092	\$31,170
H02	\$10.60	\$13.16	\$15.72	\$22,046	\$27,370	\$32,694
H03	\$11.12	\$13.81	\$16.51	\$23,125	\$28,730	\$34,336
H04	\$11.68	\$14.51	\$17.34	\$24,298	\$30,185	\$36,071
H05	\$12.29	\$15.24	\$18.20	\$25,564	\$31,709	\$37,854
H06	\$12.87	\$15.99	\$19.12	\$26,760	\$33,269	\$39,777
H07	\$13.52	\$16.80	\$20.07	\$28,121	\$34,934	\$41,747
H08	\$14.20	\$17.64	\$21.07	\$29,528	\$36,681	\$43,834
H09	\$14.92	\$18.52	\$22.12	\$31,029	\$38,522	\$46,016
H10	\$15.64	\$19.42	\$23.21	\$32,530	\$40,398	\$48,267
H11	\$16.43	\$20.41	\$24.39	\$34,172	\$42,451	\$50,730
H12	\$17.26	\$21.44	\$25.61	\$35,907	\$44,585	\$53,263
H13	\$18.13	\$22.52	\$26.90	\$37,713	\$46,836	\$55,960
H14	\$19.04	\$23.64	\$28.23	\$39,613	\$49,170	\$58,727
H15	\$19.99	\$24.82	\$29.64	\$41,583	\$51,621	\$61,659
H16	\$20.98	\$26.06	\$31.13	\$43,647	\$54,201	\$64,755
H17	\$22.03	\$27.36	\$32.69	\$45,828	\$56,910	\$67,991
H18	\$23.13	\$28.72	\$34.31	\$48,103	\$59,736	\$71,369
H19	\$24.25	\$30.15	\$36.04	\$50,448	\$62,703	\$74,957
H20	\$25.49	\$31.66	\$37.83	\$53,028	\$65,857	\$78,686

Table 15 – Current Spread and Ladders – Non-Bargaining Hourly Employees

Current Grade	Spread	Min Ladder	Mid Ladder	Max Ladder
H01	48.3%	-	-	-
H02	48.3%	4.9%	4.9%	4.9%
H03	48.5%	4.9%	5.0%	5.0%
H04	48.5%	5.1%	5.1%	5.1%
H05	48.1%	5.2%	5.1%	4.9%
H06	48.6%	4.7%	4.9%	5.1%
H07	48.5%	5.1%	5.0%	5.0%
H08	48.5%	5.0%	5.0%	5.0%
H09	48.3%	5.1%	5.0%	5.0%
H10	48.4%	4.8%	4.9%	4.9%
H11	48.5%	5.0%	5.1%	5.1%
H12	48.3%	5.1%	5.0%	5.0%
H13	48.4%	5.0%	5.0%	5.1%
H14	48.3%	5.0%	5.0%	4.9%
H15	48.3%	5.0%	5.0%	5.0%
H16	48.4%	5.0%	5.0%	5.0%
H17	48.4%	5.0%	5.0%	5.0%
H18	48.4%	5.0%	5.0%	5.0%
H19	48.6%	4.9%	5.0%	5.0%
H20	48.4%	5.1%	5.0%	5.0%

Current Salary Schedule – Non-Bargaining Salaried Employees

The current salary schedule for Non-Bargaining Salaried Employees can be found in Table 16. Summary statistics are presented in Table 17. Non-Bargaining Salaried Employees nominally work 2080 hours per year.

Table 16 – Current Salary Schedule – Non-Bargaining Salaried Employees

Current Grade	Hourly Min	Hourly Mid	Hourly Max	Annual Min	Annual Mid	Annual Max
S12	\$17.26	\$21.44	\$25.61	\$35,902	\$44,590	\$53,278
S13	\$18.13	\$22.51	\$26.89	\$37,702	\$46,817	\$55,933
S14	\$19.03	\$23.63	\$28.22	\$39,590	\$49,148	\$58,706
S15	\$19.98	\$24.81	\$29.64	\$41,566	\$51,611	\$61,656
S16	\$20.98	\$26.05	\$31.12	\$43,631	\$54,178	\$64,724
S17	\$22.03	\$27.35	\$32.68	\$45,814	\$56,892	\$67,969
S18	\$23.12	\$28.71	\$34.31	\$48,086	\$59,724	\$71,362
S19	\$24.27	\$30.15	\$36.04	\$50,476	\$62,718	\$74,961
S20	\$25.49	\$31.66	\$37.83	\$53,013	\$65,845	\$78,678
S21	\$26.75	\$33.24	\$39.73	\$55,638	\$69,135	\$82,631
S22	\$28.10	\$34.90	\$41.71	\$58,441	\$72,601	\$86,761
S23	\$29.50	\$36.65	\$43.80	\$61,361	\$76,230	\$91,098
S24	\$30.98	\$38.49	\$46.00	\$64,429	\$80,050	\$95,670
S25	\$32.52	\$40.40	\$48.28	\$67,645	\$84,032	\$100,420
S26	\$34.15	\$42.43	\$50.70	\$71,037	\$88,251	\$105,465
S27	\$35.85	\$44.54	\$53.23	\$74,578	\$92,647	\$110,716
S28	\$37.66	\$46.78	\$55.90	\$78,324	\$97,293	\$116,262
S29	\$39.54	\$49.12	\$58.69	\$82,248	\$102,161	\$122,074
S30	\$41.51	\$51.57	\$61.63	\$86,348	\$107,264	\$128,180
S31	\$43.58	\$54.15	\$64.72	\$90,655	\$112,633	\$134,611
S32	\$45.77	\$56.86	\$67.95	\$95,198	\$118,268	\$141,337
S33	\$48.05	\$59.70	\$71.34	\$99,948	\$124,168	\$148,388
S34	\$50.48	\$62.70	\$74.91	\$104,993	\$130,407	\$155,822
S35	\$52.97	\$65.82	\$78.66	\$110,185	\$136,898	\$163,610
S36	\$55.63	\$69.11	\$82.59	\$115,701	\$143,742	\$171,782

Table 17 – Current Spread and Ladders – Non-Bargaining Salaried Employees

Current Grade	Spread	Min Ladder	Mid Ladder	Max Ladder
S12	48.4%	-	-	-
S13	48.4%	5.0%	5.0%	5.0%
S14	48.3%	5.0%	5.0%	5.0%
S15	48.3%	5.0%	5.0%	5.0%
S16	48.3%	5.0%	5.0%	5.0%
S17	48.4%	5.0%	5.0%	5.0%
S18	48.4%	5.0%	5.0%	5.0%
S19	48.5%	5.0%	5.0%	5.0%
S20	48.4%	5.0%	5.0%	5.0%
S21	48.5%	5.0%	5.0%	5.0%
S22	48.5%	5.0%	5.0%	5.0%
S23	48.5%	5.0%	5.0%	5.0%
S24	48.5%	5.0%	5.0%	5.0%
S25	48.5%	5.0%	5.0%	5.0%
S26	48.5%	5.0%	5.0%	5.0%
S27	48.5%	5.0%	5.0%	5.0%
S28	48.4%	5.0%	5.0%	5.0%
S29	48.4%	5.0%	5.0%	5.0%
S30	48.4%	5.0%	5.0%	5.0%
S31	48.5%	5.0%	5.0%	5.0%
S32	48.5%	5.0%	5.0%	5.0%
S33	48.5%	5.0%	5.0%	5.0%
S34	48.4%	5.0%	5.0%	5.0%
S35	48.5%	4.9%	5.0%	5.0%
S36	48.5%	5.0%	5.0%	5.0%

The salary schedule from Table 16 has an inconsistent spread ranging from 48.3% to 48.5% as is shown in Table 17. It is important that the spread is consistent amongst all employees so that all positions have a relatively equal advancement opportunity. As is shown in Table 17, the ladders are inconsistent, ranging from 4.9% to 5.0%. It is recommended that the ladders be consistent between grades.

Overall Salary Distribution

The salary distribution for all employees is shown in Figure 1. The label “Percentage of Employees” on the ordinate y-axis reflects the total number of employees.

In examining the cumulative data, a clear bimodal pattern exists which demonstrates a two-tier compensation structure. It is preferable if there is a clear broad-banded bimodal distribution, that is, two bell curves, demonstrating both separation between supervisory and non-supervisory compensation and career progression within these two groups.

The concentration of employees in the upper end of the salary range in comparison to the lower end is not excessive, meaning that the organization is not top-heavy with respect to compensation.

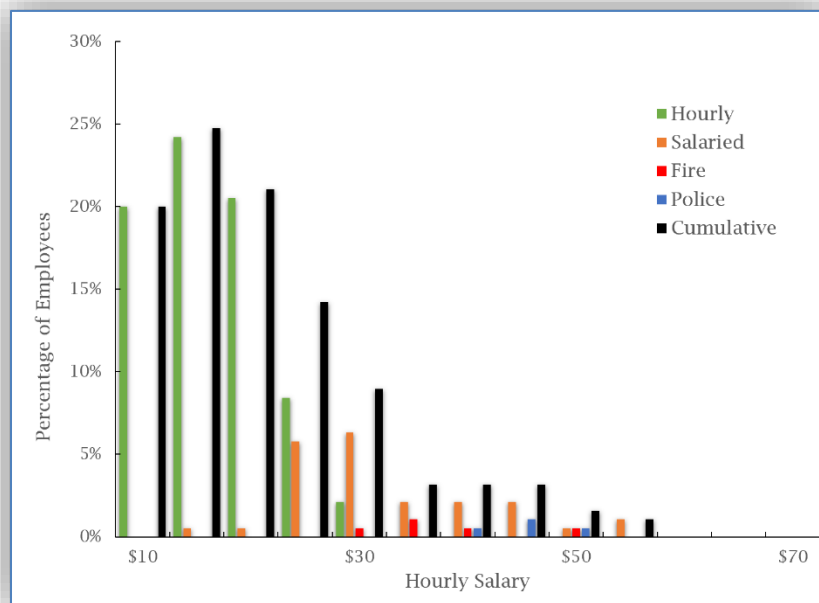


Figure 1 – Salary Distribution

Distribution Observations – Non-Bargaining Hourly Employees

Table 18 examines salaries of Non-Bargaining Hourly Employees with respect to the maximum and minimum of each grade. In Table 19, the distribution of salaries above or below the midpoint of each grade is presented. In Figure 2, a graphical distribution of the employee group is illustrated with the maximum and minimum represented by solid orange lines and the midpoint by a dashed orange line.

Observations

- For the 141 employees, thirty-nine salaries (28%) of salaries are near the maximum. A high concentration of employees at the extremes can lead to or be the cause of systemic employment issues including low morale, retention, etc.
- In Grades H04, H05, H07, H13, H15, H16, and H19, a high concentration of employees is near the minimum of each respective grade. In Grades H05 and H11, a high concentration of employees is near the maximum of each respective grade.
- In Grades H04, H07, and H12, a very high concentration of employees is below the midpoint of each respective grade suggesting skewed distribution of salaries. In Grades H10 and H11, a very high concentration of employees is above the midpoint of each respective grade suggesting skewed distribution of salaries. A high concentration of employees below the midpoint can lead to or be the cause of systemic employment issues.
- Overall, the distribution of salaries is balanced, though there may be inequity in the individual grades indicated above.
- From Figure 2, four (4) employees are currently being compensated above the maximum of the grade including 1 Sanitation Equipment Operator I, 1 Treatment Plant Operator, 1 Water Systems Specialist, and 1 LAN Systems Specialist. One (1) employee is currently being compensated below the minimum of the grade, namely, 1 Human Resource Specialist.

Table 18 - Non-Bargaining Hourly Employees Near Min/Max

Current Grade	Staff #	# near Min	% near Min	# near Max	% near Max
H01	5	0	0%	0	0%
H02	0	0	-	0	-
H03	0	0	-	0	-
H04	19	10	53%	3	16%
H05	9	2	22%	2	22%
H06	0	0	-	0	-
H07	12	10	83%	0	0%
H08	1	0	0%	0	0%
H09	25	4	16%	2	8%
H10	7	0	0%	1	14%
H11	7	0	0%	2	29%
H12	16	3	19%	1	6%
H13	11	3	27%	2	18%
H14	6	1	17%	0	0%
H15	8	2	25%	1	13%
H16	7	2	29%	1	14%
H17	5	0	0%	0	0%
H18	2	1	50%	0	0%
H19	5	1	100%	0	0%
Sum	141	39	28%	15	11%

Table 19 – Non-Bargaining Hourly Employees Near Midpoint

Current Grade	Staff #	Below Mid	Below Mid %	Above Mid	Above Mid %
H01	5	2	40%	3	60%
H02	0	0	-	0	-
H03	0	0	-	0	-
H04	19	14	74%	5	26%
H05	9	6	67%	3	33%
H06	0	0	-	0	-
H07	12	11	92%	1	8%
H08	1	1	100%	0	0%
H09	25	14	56%	11	44%
H10	7	2	29%	5	71%
H11	7	1	14%	6	86%
H12	16	11	69%	5	31%
H13	11	6	55%	5	45%
H14	6	3	50%	3	50%
H15	8	4	50%	4	50%
H16	7	4	57%	3	43%
H17	5	2	40%	3	60%
H18	2	2	100%	0	0%
H19	5	1	100%	0	0%
Sum	141	84	60%	57	40%

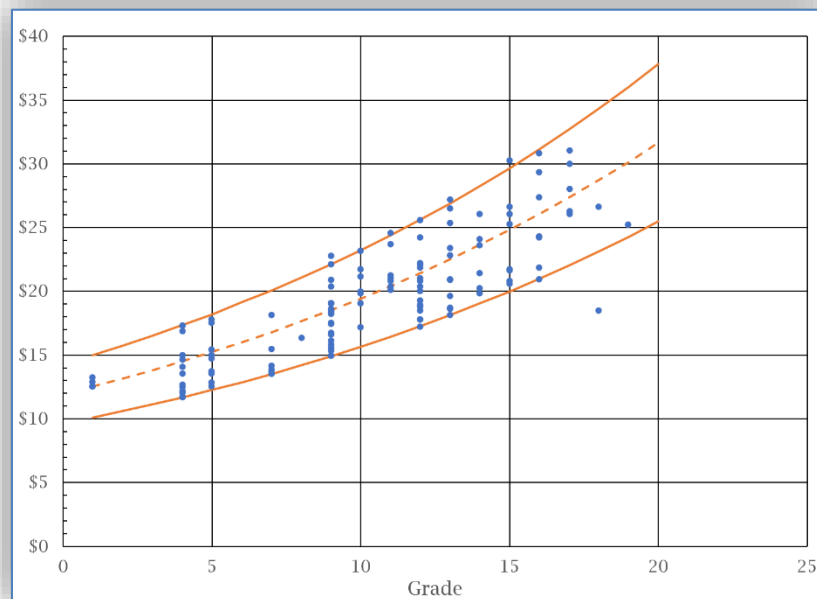


Figure 2 – Non-Bargaining Hourly Employee Compensation

(Graphical distribution of the hourly employee group is illustrated with the maximum and minimum represented by solid orange lines and the midpoint by a dashed orange line)

Distribution Observations – Non-Bargaining Salaried Employees

Table 20 examines salaries of Non-Bargaining Salaried Employees with respect to the maximum and minimum of each grade. In Table 21, the distribution of salaries above or below the midpoint of each grade is presented. In Figure 3, a graphical distribution of the employee group is illustrated with the maximum and minimum represented by solid orange lines and the midpoint by a dashed orange line.

Table 20 – Non-Bargaining Salaried Employees Near Min/Max

Current Grade	Staff #	# near Min	% near Min	# near Max	% near Max
S12	0	0	-	0	-
S13	1	0	0%	1	100%
S14	2	1	50%	0	0%
S15	0	0	-	0	-
S16	0	0	-	0	-
S17	2	0	0%	0	0%
S18	10	0	0%	3	30%
S19	4	0	0%	0	0%
S20	3	1	33%	0	0%
S21	3	0	0%	0	0%
S22	3	0	0%	1	33%
S23	2	0	0%	1	50%
S24	1	0	0%	1	100%
S25	1	0	0%	1	100%
S26	3	1	33%	0	0%
S27	2	0	0%	1	50%
S28	1	0	0%	0	0%
S29	1	0	0%	1	100%
S30	0	0	-	0	-
S31	1	0	0%	0	0%
S32	0	0	-	0	-
S33	0	0	-	0	-
S34	0	0	-	0	-
S35	0	0	-	0	-
S36	0	0	-	0	-
Sum	40	3	8%	10	25%

Table 21 – Non-Bargaining Salaried Employees Near Midpoint

Current Grade	Staff #	Below Mid	Below Mid %	Above Mid	Above Mid %
S12	0	0	-	0	-
S13	1	0	0%	1	100%
S14	2	2	100%	0	0%
S15	0	0	-	0	-
S16	0	0	-	0	-
S17	2	0	0%	2	100%
S18	10	3	30%	7	70%
S19	4	1	25%	3	75%
S20	3	2	67%	1	33%
S21	3	1	33%	2	67%
S22	3	1	33%	2	67%
S23	2	0	0%	2	100%
S24	1	0	0%	1	100%
S25	1	0	0%	1	100%
S26	3	1	33%	2	67%
S27	2	0	0%	2	100%
S28	1	0	0%	1	100%
S29	1	0	0%	1	100%
S30	0	0	-	0	-
S31	1	0	0%	1	100%
S32	0	0	-	0	-
S33	0	0	-	0	-
S34	0	0	-	0	-
S35	0	0	-	0	-
S36	0	0	-	0	-
Sum	40	11	28%	29	72%

Observations

- For the 40 employees, ten salaries (25%) are near the maximum.
- In Grade S18, a high concentration of employees is near the maximum of the respective grade.
- In Grade S18, a very high concentration of employees is above the midpoint of the respective grade suggesting skewed distribution of salaries.
- Employees at the highest grades are generally compensated above the midpoint of the respective grades.
- Overall, there is a high concentration of employees above the midpoint of the grade (72%) suggesting, that is, there is an unbalanced distribution of salaries. Additionally, there may be inequity in the individual grades indicated above.
- From Figure 3, no employees are currently being compensated above the maximum of the grade nor compensated below grade minimums.

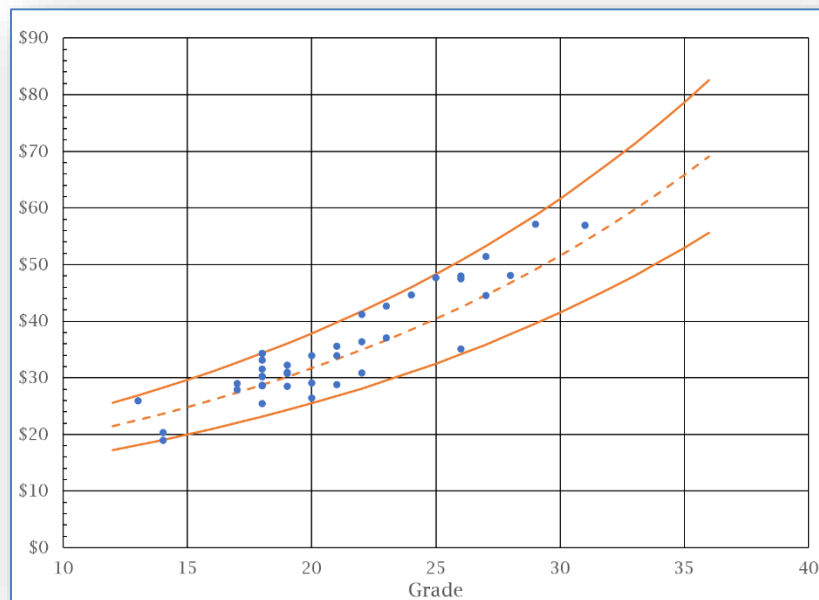


Figure 3 – Non-Bargaining Salaried Employee Compensation

(Graphical distribution of the hourly employee group is illustrated with the maximum and minimum represented by solid orange lines and the midpoint by a dashed orange line)

External Market Comparison

A summary of the findings of the external market analysis is presented in Table 22 through Table 24. In Table 25 through Table 28 the external market findings for all job titles is presented, sorted alphabetically. Fire Rescue results are in Table 25, Police results are in Table 26, Hourly results are in Table 27, and Salaried results are in Table 28. The minimum, midpoint, and maximum hourly salary for each job title is presented first. The market average (mean) and the various market quantiles are then presented. Lastly the Compa-Ratio, the ratio of the grade's midpoint divided by the 50th percentile from the external market, which measures the extent of the deviation of the current salary range in comparison to the market median, is presented. Values highlighted in red indicate that the range is above market and those highlighted in green indicate that the range is below market.

Table 22 – Full-Time Positions Below Market (% Diff < -5%)

Accounts Payable Specialist	P/T Fiscal Assistant
Admin & Program Supervisor	P/T Lead Leisure Driver
Administrative Office Coordinator - CS	P/T Leisure Driver
Afterschool Program Leader	P/T Office Assistant
Assistant to City Clerk	P/T Parking Enforcement Specialist
Building Inspector	P/T Recreation Leader
Business Tax Technician	Paralegal
Capital Projects Coordinator	Permit Technician
Civilian Enforcement Officer	Police Dispatch Supervisor
Civilian Enforcement Supervisor	Police Dispatcher II
Community Affairs Liaison	Procurement Specialist
Community Services Director	Program Manager
Community Services Division Manager	Public Works Administrative Coordinator
CRA Administrator	Public Works Inspector
Custodian	Recreation Programs Supervisor
Customer Service Representative II	Sanitation & Fleet Manager
Customer Service Representative III	Sanitation Equipment Operator I
Customer Service Supervisor	Sanitation Equipment Operator II

Deputy Public Works Director	Sanitation Worker
Diesel/Gas Mechanic	Senior Accountant
Division Assistant	Senior Maintenance Mechanic
Equipment Operator I	Senior Planner
Executive Secretary to Public Safety	Software Application Specialist
Field Services Manager	Special Events & Tourism Specialist
Financial Services Assistant Director	System Technician
Fire Inspector / Investigator	Systems Analyst
Fire Rescue Battalion Chief Training/Logistics	Team Leader I
Fiscal Assistant I	Team Leader I – Tram Services
Groundskeeper	Team Leader II
Human Resources Director	Team Leader III
Information Services Director	Treatment Plant Operator I
Information Systems Coordinator	Treatment Plant Operator III
Infrastructure Location System Specialist	Utility Maintenance Mechanic
Instrument/Ctrl/SCADA Specialist	Utility Service Worker II
Laboratory Technician	Water Distribution System Specialist
Laborer I	Water Reclamation System Specialist
LAN Systems Specialist	Water Systems Specialist
Maintenance Mechanic	WTP Operator Trainee
Meter Reader	WWTP Operator I
Nursery Worker	WWTP Operator II
On Call Recreation Leader	WWTP Operator III
P/T Athletic Coordinator	Youth Intervention Counselor
P/T Behavioral Program Specialist	

Table 23 – Full-Time Positions Near Market (-5% < % Diff < +5%)

Accountant	Logistics & Support Technician
Assistant Public Works Director/City Engineer	P/T Crime Analyst
Building Official	P/T Customer Service Representative I
City Clerk	P/T Police Dispatcher
Customer Service Representative I	Payroll Specialist
Development Director	Plant Services Manager
Executive Assistant to City Manager	Police Captain
Fire Rescue Battalion Chief	Police Chief
Human Resources Analyst	Police Dispatcher I
Laborer II	Public Works Director

Table 24 – Full-Time Positions Above Market (Diff > +5%)

Building Maintenance Coordinator	Human Resources Specialist
Financial Services Director	Network Specialist
Fire Chief	

Table 25 – External Market Comparison – Fire Rescue Leadership

	Fire Chief	Fire Rescue Battalion Chief
Current Scale		
Grade	X29	B22
Minimum	\$38.82	\$23.99
Midpoint	\$51.43	\$32.66
Maximum	\$64.05	\$41.32
Market Percentiles		
20%	\$38.35	\$27.16
25%	\$40.61	\$27.23
30%	\$41.86	\$28.51
35%	\$43.11	\$30.79
40%	\$43.88	\$31.61
45%	\$45.13	\$31.86
50%	\$48.17	\$32.27
55%	\$49.82	\$32.85
60%	\$51.41	\$34.95
65%	\$52.25	\$36.94
70%	\$53.14	\$38.60
75%	\$57.21	\$39.96
80%	\$61.27	\$40.96
Mean	\$50.05	\$33.98
Compa-Ratio	+6.8%	+1.2%

Table 26 – External Market Comparison – Police Leadership

	Police Captain	Police Chief
Current Scale		
Grade	X24	X29
Minimum	\$30.98	\$38.82
Midpoint	\$39.85	\$51.43
Maximum	\$48.32	\$64.05
Market Percentiles		
20%	\$35.49	\$39.87
25%	\$37.95	\$43.06
30%	\$38.79	\$44.33
35%	\$38.91	\$46.78
40%	\$39.65	\$47.88
45%	\$40.88	\$48.80
50%	\$41.51	\$51.43
55%	\$45.98	\$53.17
60%	\$48.32	\$53.26
65%	\$48.48	\$55.24
70%	\$48.56	\$59.66
75%	\$49.34	\$61.14
80%	\$52.57	\$64.83
Mean	\$44.53	\$52.60
Compa-Ratio	-4.0%	0.0%

Table 27 – External Market Comparison – Hourly

	Accountant	AP Specialist	Admin. Office Coordinator	Afterschool Program Leader	Assistant to City Clerk
Current Scale					
Grade	H17	H13	H15	H08	H15
Minimum	\$22.03	\$18.13	\$19.99	\$14.20	\$19.99
Midpoint	\$27.36	\$22.52	\$24.82	\$17.64	\$24.82
Maximum	\$32.69	\$26.90	\$29.64	\$21.07	\$29.64
Market Percentiles					
20%	\$21.87	\$19.41	\$21.23	\$15.73	\$22.56
25%	\$22.26	\$20.02	\$22.00	\$16.04	\$23.43
30%	\$23.08	\$20.69	\$22.74	\$16.57	\$24.22
35%	\$24.04	\$21.50	\$23.61	\$17.26	\$25.13
40%	\$26.84	\$22.45	\$24.57	\$18.17	\$26.11
45%	\$27.07	\$23.33	\$25.48	\$18.98	\$27.05
50%	\$27.22	\$24.07	\$26.33	\$19.51	\$27.98
55%	\$27.73	\$24.72	\$27.10	\$19.92	\$28.83
60%	\$28.23	\$25.57	\$28.01	\$20.68	\$29.77
65%	\$28.93	\$26.49	\$29.00	\$21.45	\$30.81
70%	\$32.04	\$27.45	\$30.04	\$22.25	\$31.91
75%	\$32.66	\$28.35	\$31.06	\$22.91	\$33.02
80%	\$33.05	\$29.37	\$32.29	\$23.50	\$34.40
Mean	\$27.61	\$24.68	\$27.07	\$19.88	\$28.80
Compa-Ratio	+0.5%	-6.4%	-5.8%	-9.6%	-11.3%

	Building Inspector	Business Tax Technician	Civilian Enforce. Officer	Civilian Enforce. Supervisor	Custodian
Current Scale					
Grade	H17	H12	H13	H18	H01
Minimum	\$22.03	\$17.26	\$18.13	\$23.13	\$10.10
Midpoint	\$27.36	\$21.44	\$22.52	\$28.72	\$12.54
Maximum	\$32.69	\$25.61	\$26.90	\$34.31	\$14.99
Market Percentiles					
20%	\$23.08	\$19.58	\$20.62	\$26.29	\$11.95
25%	\$23.98	\$20.21	\$21.34	\$27.48	\$11.93
30%	\$25.67	\$20.88	\$22.05	\$28.40	\$12.33
35%	\$26.63	\$21.70	\$22.90	\$29.44	\$12.89
40%	\$27.38	\$22.65	\$23.86	\$30.46	\$13.76
45%	\$28.85	\$23.53	\$24.76	\$31.46	\$14.50
50%	\$29.57	\$24.28	\$25.58	\$32.61	\$14.81
55%	\$30.35	\$24.94	\$26.30	\$33.71	\$14.97
60%	\$31.60	\$25.80	\$27.19	\$34.74	\$15.63
65%	\$32.47	\$26.73	\$28.16	\$35.94	\$16.25
70%	\$33.04	\$27.70	\$29.17	\$37.19	\$16.89
75%	\$34.75	\$28.61	\$30.15	\$38.55	\$17.30
80%	\$36.54	\$29.65	\$31.31	\$40.37	\$17.45
Mean	\$30.63	\$24.91	\$26.27	\$33.69	\$14.92
Compa-Ratio	-7.5%	-11.7%	-12.0%	-11.9%	-15.3%

	Customer Service Rep. I	Customer Service Rep. II	Customer Service Rep. III	Customer Service Supervisor	Diesel/Gas Mechanic
Current Scale					
Grade	H09	H10	H11	H15	H16
Minimum	\$14.92	\$15.64	\$16.43	\$19.99	\$20.98
Midpoint	\$18.52	\$19.42	\$20.41	\$24.82	\$26.06
Maximum	\$22.12	\$23.21	\$24.39	\$29.64	\$31.13
Market Percentiles					
20%	\$14.73	\$17.22	\$18.41	\$24.04	\$24.02
25%	\$15.17	\$17.65	\$18.94	\$24.24	\$25.02
30%	\$15.76	\$18.24	\$19.58	\$24.82	\$25.86
35%	\$16.93	\$18.98	\$20.35	\$26.81	\$26.83
40%	\$17.91	\$19.90	\$21.29	\$26.86	\$27.82
45%	\$18.27	\$20.74	\$22.15	\$26.99	\$28.78
50%	\$18.71	\$21.36	\$22.83	\$28.35	\$29.80
55%	\$19.10	\$21.86	\$23.41	\$29.45	\$30.75
60%	\$19.71	\$22.66	\$24.25	\$29.64	\$31.72
65%	\$20.58	\$23.49	\$25.12	\$31.98	\$32.83
70%	\$21.17	\$24.36	\$26.04	\$33.21	\$33.99
75%	\$21.79	\$25.12	\$26.88	\$33.43	\$35.19
80%	\$22.07	\$25.88	\$27.78	\$34.19	\$36.75
Mean	\$18.67	\$21.83	\$23.38	\$29.41	\$30.72
Compa- Ratio	-1.0%	-9.1%	-10.6%	-12.5%	-12.5%

	Division Assistant	Equipment Operator I	Exec. Asst. to City Manager	Exec. Sec. to Public Safety	Fire Inspector/ Investigator
Current Scale					
Grade	H12	H05	H17	H16	H16
Minimum	\$17.26	\$12.29	\$22.03	\$20.98	\$20.98
Midpoint	\$21.44	\$15.24	\$27.36	\$26.06	\$26.06
Maximum	\$25.61	\$18.20	\$32.69	\$31.13	\$31.13
Market Percentiles					
20%	\$18.24	\$15.12	\$21.20	\$22.78	\$23.16
25%	\$18.75	\$15.26	\$21.78	\$23.68	\$24.09
30%	\$19.38	\$15.42	\$23.15	\$24.47	\$24.89
35%	\$20.15	\$15.56	\$24.18	\$25.40	\$25.83
40%	\$21.08	\$16.38	\$25.49	\$26.38	\$26.82
45%	\$21.94	\$17.93	\$25.63	\$27.32	\$27.76
50%	\$22.62	\$18.10	\$26.44	\$28.26	\$28.72
55%	\$23.19	\$18.55	\$26.96	\$29.13	\$29.62
60%	\$24.01	\$18.98	\$28.68	\$30.07	\$30.57
65%	\$24.88	\$19.80	\$31.05	\$31.12	\$31.64
70%	\$25.79	\$20.23	\$31.51	\$32.23	\$32.76
75%	\$26.62	\$20.93	\$32.14	\$33.35	\$33.91
80%	\$27.50	\$22.68	\$32.51	\$34.77	\$35.37
Mean	\$23.15	\$18.50	\$27.36	\$29.10	\$29.59
Compa-Ratio	-5.2%	-15.8%	3.5%	-7.8%	-9.3%

	Fiscal Assistant I	Grounds-keeper	Human Resources Specialist	Infra. Location Sys. Spec.	Instrument Ctrl/SCADA Specialist
Current Scale					
Grade	H09	H04	H18	H14	H17
Minimum	\$14.92	\$11.68	\$23.13	\$19.04	\$22.03
Midpoint	\$18.52	\$14.51	\$28.72	\$23.64	\$27.36
Maximum	\$22.12	\$17.34	\$34.31	\$28.23	\$32.69
Market Percentiles					
20%	\$16.89	\$13.61	\$20.62	\$21.65	\$24.96
25%	\$17.29	\$13.73	\$21.34	\$22.45	\$26.04
30%	\$17.87	\$14.19	\$22.05	\$23.20	\$26.91
35%	\$18.59	\$14.80	\$22.90	\$24.08	\$27.91
40%	\$19.51	\$15.69	\$23.86	\$25.05	\$28.92
45%	\$20.34	\$16.46	\$24.76	\$25.97	\$29.89
50%	\$20.94	\$16.87	\$25.58	\$26.85	\$30.96
55%	\$21.42	\$17.13	\$26.30	\$27.64	\$31.98
60%	\$22.21	\$17.84	\$27.19	\$28.56	\$32.98
65%	\$23.03	\$18.52	\$28.16	\$29.56	\$34.12
70%	\$23.88	\$19.24	\$29.17	\$30.62	\$35.32
75%	\$24.62	\$19.76	\$30.15	\$31.67	\$36.58
80%	\$25.34	\$20.10	\$31.31	\$32.95	\$38.25
Mean	\$21.39	\$17.09	\$26.27	\$27.61	\$31.95
Compa-Ratio	-11.6%	-14.0%	+12.3%	-11.9%	-11.6%

	Lab. Technician	Laborer I	Laborer II	LAN Systems Specialist	Logistics & Support Technician
Current Scale					
Grade	H15	H01	H04	H15	H11
Minimum	\$19.99	\$10.10	\$11.68	\$19.99	\$16.43
Midpoint	\$24.82	\$12.54	\$14.51	\$24.82	\$20.41
Maximum	\$29.64	\$14.99	\$17.34	\$29.64	\$24.39
Market Percentiles					
20%	\$21.86	\$11.68	\$11.85	\$22.89	\$17.15
25%	\$22.68	\$11.64	\$11.82	\$23.79	\$17.57
30%	\$23.43	\$12.04	\$12.22	\$24.59	\$18.16
35%	\$24.33	\$12.58	\$12.77	\$25.52	\$18.89
40%	\$25.30	\$13.45	\$13.64	\$26.50	\$19.81
45%	\$26.22	\$14.19	\$14.38	\$27.44	\$20.65
50%	\$27.11	\$14.49	\$14.69	\$28.39	\$21.26
55%	\$27.92	\$14.62	\$14.83	\$29.27	\$21.76
60%	\$28.84	\$15.28	\$15.50	\$30.21	\$22.56
65%	\$29.85	\$15.88	\$16.11	\$31.27	\$23.38
70%	\$30.92	\$16.52	\$16.74	\$32.38	\$24.25
75%	\$31.98	\$16.91	\$17.15	\$33.51	\$25.00
80%	\$33.29	\$17.03	\$17.29	\$34.94	\$25.76
Mean	\$27.89	\$14.58	\$14.79	\$29.24	\$21.72
Compa- Ratio	-8.5%	-13.4%	-1.2%	-12.6%	-4.0%

	Maint. Mechanic	Meter Reader	Nursery Worker	On Call Recreation Leader	P/T Athletic Coordinator
Current Scale					
Grade	H09	H11	H05	H07	H07
Minimum	\$14.92	\$16.43	\$12.29	\$13.52	\$13.52
Midpoint	\$18.52	\$20.41	\$15.24	\$16.80	\$16.80
Maximum	\$22.12	\$24.39	\$18.20	\$20.07	\$20.07
Market Percentiles					
20%	\$17.23	\$18.36	\$15.15	\$14.39	\$14.50
25%	\$17.65	\$18.88	\$15.41	\$14.58	\$14.70
30%	\$18.25	\$19.51	\$15.92	\$15.07	\$15.19
35%	\$18.98	\$20.28	\$16.59	\$15.71	\$15.83
40%	\$19.90	\$21.22	\$17.49	\$16.60	\$16.73
45%	\$20.75	\$22.08	\$18.29	\$17.39	\$17.52
50%	\$21.36	\$22.76	\$18.79	\$17.85	\$17.98
55%	\$21.87	\$23.34	\$19.16	\$18.16	\$18.30
60%	\$22.67	\$24.17	\$19.90	\$18.89	\$19.03
65%	\$23.49	\$25.05	\$20.65	\$19.60	\$19.75
70%	\$24.36	\$25.96	\$21.43	\$20.35	\$20.50
75%	\$25.12	\$26.80	\$22.05	\$20.92	\$21.08
80%	\$25.88	\$27.69	\$22.57	\$21.35	\$21.53
Mean	\$21.83	\$23.31	\$19.12	\$18.12	\$18.26
Compa- Ratio	-13.3%	-10.3%	-18.9%	-5.9%	-6.6%

	P/T Behavioral Prog. Spec.	P/T Crime Analyst	P/T Customer Serv. Rep.	P/T Fiscal Assistant	P/T Lead Leisure Driver
Current Scale					
Grade	H15	H12	H09	H09	H05
Minimum	\$19.99	\$17.26	\$14.92	\$14.92	\$12.29
Midpoint	\$24.82	\$21.44	\$18.52	\$18.52	\$15.24
Maximum	\$29.64	\$25.61	\$22.12	\$22.12	\$18.20
Market Percentiles					
20%	\$21.77	\$16.98	\$14.73	\$16.89	\$16.28
25%	\$22.58	\$17.39	\$15.17	\$17.29	\$16.63
30%	\$23.34	\$17.97	\$15.76	\$17.87	\$17.19
35%	\$24.23	\$18.70	\$16.93	\$18.59	\$17.89
40%	\$25.20	\$19.62	\$17.91	\$19.51	\$18.81
45%	\$26.12	\$20.46	\$18.27	\$20.34	\$19.63
50%	\$27.00	\$21.06	\$18.71	\$20.94	\$20.19
55%	\$27.81	\$21.55	\$19.10	\$21.42	\$20.63
60%	\$28.72	\$22.34	\$19.71	\$22.21	\$21.41
65%	\$29.74	\$23.16	\$20.58	\$23.03	\$22.20
70%	\$30.80	\$24.02	\$21.17	\$23.88	\$23.03
75%	\$31.86	\$24.76	\$21.79	\$24.62	\$23.72
80%	\$33.15	\$25.49	\$22.07	\$25.34	\$24.38
Mean	\$27.78	\$21.51	\$18.67	\$21.39	\$20.59
Compa- Ratio	-8.1%	+1.8%	-1.0%	-11.6%	-24.5%

	P/T Leisure Driver	P/T Office Assistant	P/T Parking Enforce. Specialist	P/T Police Dispatcher	P/T Recreation Leader
Current Scale					
Grade	H04	H05	H07	H12	H07
Minimum	\$11.68	\$12.29	\$13.52	\$17.26	\$13.52
Midpoint	\$14.51	\$15.24	\$16.80	\$21.44	\$16.80
Maximum	\$17.34	\$18.20	\$20.07	\$25.61	\$20.07
Market Percentiles					
20%	\$13.06	\$13.77	\$14.52	\$17.61	\$14.39
25%	\$13.14	\$13.90	\$14.72	\$18.57	\$14.58
30%	\$13.58	\$14.37	\$15.22	\$19.45	\$15.07
35%	\$14.17	\$14.98	\$15.86	\$20.28	\$15.71
40%	\$15.05	\$15.87	\$16.76	\$20.60	\$16.60
45%	\$15.82	\$16.65	\$17.55	\$20.73	\$17.39
50%	\$16.19	\$17.07	\$18.01	\$21.09	\$17.85
55%	\$16.42	\$17.34	\$18.33	\$21.61	\$18.16
60%	\$17.11	\$18.06	\$19.06	\$23.53	\$18.89
65%	\$17.77	\$18.74	\$19.78	\$24.97	\$19.60
70%	\$18.46	\$19.46	\$20.53	\$25.17	\$20.35
75%	\$18.95	\$20.00	\$21.12	\$25.35	\$20.92
80%	\$19.23	\$20.36	\$21.56	\$25.54	\$21.35
Mean	\$16.38	\$17.30	\$18.29	\$21.99	\$18.12
Compa-Ratio	-10.4%	-10.7%	-6.7%	+1.6%	-5.9%

	Paralegal	Payroll Specialist	Permit Technician	Police Dispatcher I	Police Dispatcher II
Current Scale					
Grade	H19	H12	H09	H12	H14
Minimum	\$24.25	\$17.26	\$14.92	\$17.26	\$19.04
Midpoint	\$30.15	\$21.44	\$18.52	\$21.44	\$23.64
Maximum	\$36.04	\$25.61	\$22.12	\$25.61	\$28.23
Market Percentiles					
20%	\$26.21	\$17.78	\$17.89	\$17.61	\$21.25
25%	\$27.40	\$18.25	\$18.38	\$18.57	\$22.02
30%	\$28.32	\$18.86	\$19.00	\$19.45	\$22.76
35%	\$29.36	\$19.62	\$19.75	\$20.28	\$23.63
40%	\$30.37	\$20.55	\$20.68	\$20.60	\$24.59
45%	\$31.37	\$21.40	\$21.54	\$20.73	\$25.51
50%	\$32.51	\$22.05	\$22.19	\$21.09	\$26.36
55%	\$33.61	\$22.59	\$22.74	\$21.61	\$27.13
60%	\$34.64	\$23.40	\$23.56	\$23.53	\$28.03
65%	\$35.83	\$24.25	\$24.41	\$24.97	\$29.02
70%	\$37.09	\$25.14	\$25.31	\$25.17	\$30.06
75%	\$38.43	\$25.94	\$26.11	\$25.35	\$31.08
80%	\$40.25	\$26.77	\$26.95	\$25.54	\$32.32
Mean	\$33.59	\$22.55	\$22.70	\$21.99	\$27.10
Compa-Ratio	-7.3%	-2.8%	-16.5%	+1.6%	-10.3%

	Police Dispatch Supervisor	Procure. Specialist	P/W Admin. Coordinator	Public Works Inspector	Sanitation Equipment Operator I
Current Scale					
Grade	H15	H15	H16	H16	H09
Minimum	\$19.99	\$19.99	\$20.98	\$20.98	\$14.92
Midpoint	\$24.82	\$24.82	\$26.06	\$26.06	\$18.52
Maximum	\$29.64	\$29.64	\$31.13	\$31.13	\$22.12
Market Percentiles					
20%	\$22.53	\$22.67	\$24.49	\$24.02	\$18.00
25%	\$23.40	\$23.56	\$25.52	\$25.02	\$18.50
30%	\$24.18	\$24.35	\$26.38	\$25.86	\$19.12
35%	\$25.10	\$25.27	\$27.36	\$26.83	\$19.88
40%	\$26.08	\$26.25	\$28.36	\$27.82	\$20.81
45%	\$27.01	\$27.19	\$29.33	\$28.78	\$21.67
50%	\$27.94	\$28.12	\$30.37	\$29.80	\$22.33
55%	\$28.79	\$28.98	\$31.35	\$30.75	\$22.88
60%	\$29.73	\$29.92	\$32.34	\$31.72	\$23.70
65%	\$30.77	\$30.97	\$33.46	\$32.83	\$24.56
70%	\$31.87	\$32.08	\$34.64	\$33.99	\$25.46
75%	\$32.97	\$33.19	\$35.87	\$35.19	\$26.27
80%	\$34.35	\$34.59	\$37.49	\$36.75	\$27.13
Mean	\$28.76	\$28.96	\$31.33	\$30.72	\$22.85
Compa-Ratio	-11.2%	-11.7%	-14.2%	-12.5%	-17.1%

	Sanitation Equipment Operator II	Sanitation Worker	Special Events & Tourism	Senior Maint. Mechanic	System Technician
Current Scale					
Grade	H10	H04	H10	H10	H11
Minimum	\$15.64	\$11.68	\$15.64	\$15.64	\$16.43
Midpoint	\$19.42	\$14.51	\$19.42	\$19.42	\$20.41
Maximum	\$23.21	\$17.34	\$23.21	\$23.21	\$24.39
Market Percentiles					
20%	\$18.65	\$15.74	\$17.05	\$18.31	\$17.90
25%	\$19.19	\$16.04	\$17.46	\$18.83	\$18.38
30%	\$19.84	\$16.58	\$18.05	\$19.46	\$19.00
35%	\$20.62	\$17.27	\$18.77	\$20.23	\$19.76
40%	\$21.56	\$18.18	\$19.70	\$21.17	\$20.69
45%	\$22.43	\$18.99	\$20.53	\$22.03	\$21.54
50%	\$23.12	\$19.52	\$21.14	\$22.71	\$22.20
55%	\$23.72	\$19.93	\$21.63	\$23.28	\$22.75
60%	\$24.56	\$20.69	\$22.43	\$24.11	\$23.56
65%	\$25.44	\$21.46	\$23.25	\$24.98	\$24.42
70%	\$26.37	\$22.26	\$24.11	\$25.90	\$25.32
75%	\$27.23	\$22.92	\$24.86	\$26.73	\$26.12
80%	\$28.15	\$23.51	\$25.60	\$27.62	\$26.96
Mean	\$23.69	\$19.89	\$21.59	\$23.25	\$22.71
Compa- Ratio	-16.0%	-25.7%	-8.1%	-14.5%	-8.1%

	Team Leader I	Team Leader I - Tram Svcs.	Treatment Plant Operator I	Treatment Plant Operator III	Utility Maint. Mechanic
Current Scale					
Grade	H12	H13	H11	H13	H12
Minimum	\$17.26	\$18.13	\$16.43	\$18.13	\$17.26
Midpoint	\$21.44	\$22.52	\$20.41	\$22.52	\$21.44
Maximum	\$25.61	\$26.90	\$24.39	\$26.90	\$25.61
Market Percentiles					
20%	\$19.13	\$20.48	\$18.08	\$20.59	\$19.10
25%	\$19.55	\$21.19	\$18.58	\$21.30	\$19.69
30%	\$20.13	\$21.89	\$19.21	\$22.02	\$20.35
35%	\$21.44	\$22.74	\$19.97	\$22.87	\$21.15
40%	\$21.76	\$23.70	\$20.90	\$23.83	\$22.09
45%	\$24.24	\$24.60	\$21.76	\$24.73	\$22.97
50%	\$25.14	\$25.40	\$22.43	\$25.54	\$23.69
55%	\$25.27	\$26.12	\$22.98	\$26.26	\$24.32
60%	\$25.34	\$27.01	\$23.81	\$27.15	\$25.17
65%	\$25.61	\$27.97	\$24.67	\$28.12	\$26.07
70%	\$26.22	\$28.97	\$25.58	\$29.13	\$27.02
75%	\$26.44	\$29.95	\$26.39	\$30.11	\$27.90
80%	\$28.35	\$31.09	\$27.25	\$31.26	\$28.89
Mean	\$24.38	\$26.09	\$22.95	\$26.23	\$24.29
Compa- Ratio	-14.7%	-11.4%	-9.0%	-11.8%	-9.5%

	Utility Service Worker II	Water Dist. System Specialist	Water Recl. System Specialist	Water Systems Specialist	WTP Operator Trainee
Current Scale					
Grade	H09	H13	H13	H13	H09
Minimum	\$14.92	\$18.13	\$18.13	\$18.13	\$14.92
Midpoint	\$18.52	\$22.52	\$22.52	\$22.52	\$18.52
Maximum	\$22.12	\$26.90	\$26.90	\$26.90	\$22.12
Market Percentiles					
20%	\$17.39	\$20.62	\$21.08	\$19.81	\$16.09
25%	\$17.83	\$21.34	\$21.83	\$20.46	\$16.42
30%	\$18.43	\$22.05	\$22.57	\$21.15	\$16.97
35%	\$19.17	\$22.90	\$23.43	\$21.97	\$17.67
40%	\$20.09	\$23.86	\$24.39	\$22.92	\$18.58
45%	\$20.94	\$24.76	\$25.30	\$23.81	\$19.40
50%	\$21.56	\$25.58	\$26.15	\$24.57	\$19.95
55%	\$22.07	\$26.30	\$26.90	\$25.25	\$20.38
60%	\$22.88	\$27.19	\$27.80	\$26.11	\$21.15
65%	\$23.71	\$28.16	\$28.79	\$27.05	\$21.93
70%	\$24.59	\$29.17	\$29.82	\$28.03	\$22.75
75%	\$25.36	\$30.15	\$30.83	\$28.95	\$23.44
80%	\$26.14	\$31.31	\$32.05	\$30.02	\$24.07
Mean	\$22.04	\$26.27	\$26.87	\$25.22	\$20.34
Compa- Ratio	-14.1%	-12.0%	-13.9%	-8.4%	-7.2%

	WWTP Operator I	WWTP Operator II	WWTP Operator III
Current Scale			
Grade	H11	H12	H13
Minimum	\$16.43	\$17.26	\$18.13
Midpoint	\$20.41	\$21.44	\$22.52
Maximum	\$24.39	\$25.61	\$26.90
Market Percentiles			
20%	\$18.15	\$19.13	\$20.39
25%	\$19.00	\$20.55	\$21.08
30%	\$19.39	\$21.33	\$21.79
35%	\$20.41	\$21.44	\$22.63
40%	\$20.50	\$22.14	\$23.59
45%	\$21.12	\$22.17	\$24.49
50%	\$22.68	\$24.30	\$25.29
55%	\$23.14	\$24.95	\$26.00
60%	\$23.87	\$25.34	\$26.88
65%	\$24.39	\$25.61	\$27.84
70%	\$24.92	\$26.91	\$28.84
75%	\$25.27	\$27.34	\$29.81
80%	\$26.40	\$27.70	\$30.94
Mean	\$22.71	\$24.23	\$25.97
Compa- Ratio	-10.0%	-11.8%	-11.0%

Table 28 – External Market Comparison – Salaried

	Admin. & Program Supervisor	Asst. P/W Dir. / City Engineer	Building Maint. Coordinator	Building Official	Capital Projects Coord.
Current Scale					
Grade	S14	S25	S21	S27	S21
Minimum	\$19.03	\$32.52	\$26.75	\$35.85	\$26.75
Midpoint	\$23.63	\$40.40	\$33.24	\$44.54	\$33.24
Maximum	\$28.22	\$48.28	\$39.73	\$53.23	\$39.73
Market Percentiles					
20%	\$21.88	\$34.06	\$24.92	\$36.37	\$29.90
25%	\$22.70	\$35.91	\$25.53	\$38.10	\$31.40
30%	\$23.46	\$37.11	\$26.09	\$40.48	\$32.45
35%	\$24.35	\$38.41	\$26.83	\$41.85	\$33.61
40%	\$25.32	\$39.51	\$28.34	\$43.42	\$34.67
45%	\$26.25	\$40.65	\$29.25	\$44.48	\$35.73
50%	\$27.14	\$42.25	\$31.34	\$45.53	\$37.09
55%	\$27.95	\$43.86	\$32.72	\$46.09	\$38.43
60%	\$28.87	\$45.10	\$33.73	\$48.17	\$39.55
65%	\$29.88	\$46.61	\$33.99	\$49.01	\$40.90
70%	\$30.95	\$48.20	\$34.54	\$50.36	\$42.31
75%	\$32.01	\$50.05	\$38.53	\$54.09	\$43.89
80%	\$33.32	\$52.79	\$40.57	\$58.36	\$46.14
Mean	\$27.92	\$43.86	\$33.49	\$47.58	\$38.41
Compa- Ratio	-12.9%	-4.4%	+6.1%	-2.2%	-10.4%

	City Clerk	Community Affairs Liaison	Community Services Director	Community Services Div. Mgr.	CRA Admin.
Current Scale					
Grade	\$26	\$18	\$26	\$21	\$23
Minimum	\$34.15	\$23.12	\$34.15	\$26.75	\$29.50
Midpoint	\$42.43	\$28.71	\$42.43	\$33.24	\$36.65
Maximum	\$50.70	\$34.31	\$50.70	\$39.73	\$43.80
Market Percentiles					
20%	\$34.90	\$26.86	\$40.87	\$30.16	\$30.06
25%	\$36.81	\$28.10	\$42.83	\$31.67	\$31.61
30%	\$38.04	\$29.04	\$43.80	\$32.73	\$32.91
35%	\$39.38	\$30.10	\$45.55	\$33.91	\$34.01
40%	\$40.49	\$31.13	\$46.67	\$34.96	\$35.24
45%	\$41.64	\$32.14	\$48.35	\$36.04	\$36.53
50%	\$43.29	\$33.32	\$49.34	\$37.41	\$40.13
55%	\$44.96	\$34.45	\$50.91	\$38.76	\$43.62
60%	\$46.21	\$35.50	\$53.18	\$39.90	\$43.72
65%	\$47.76	\$36.72	\$55.15	\$41.25	\$44.11
70%	\$49.38	\$38.00	\$56.71	\$42.67	\$45.24
75%	\$51.29	\$39.39	\$58.97	\$44.27	\$48.13
80%	\$54.12	\$41.28	\$62.59	\$46.55	\$53.11
Mean	\$44.95	\$34.44	\$51.30	\$38.75	\$42.02
Compa- Ratio	-2.0%	-13.8%	-14.0%	-11.1%	-8.7%

	Deputy P/W Director	Develop. Director	Field Services Manager	Financial Services Asst. Dir.	Financial Services Director
Current Scale					
Grade	S23	S28	S22	S24	S31
Minimum	\$29.50	\$37.66	\$28.10	\$30.98	\$43.58
Midpoint	\$36.65	\$46.78	\$34.90	\$38.49	\$54.15
Maximum	\$43.80	\$55.90	\$41.71	\$46.00	\$64.72
Market Percentiles					
20%	\$33.79	\$38.96	\$31.27	\$33.33	\$40.42
25%	\$35.61	\$42.36	\$32.88	\$35.11	\$43.25
30%	\$36.80	\$43.87	\$33.98	\$36.28	\$43.55
35%	\$38.10	\$45.42	\$35.19	\$37.57	\$44.69
40%	\$39.20	\$45.52	\$36.26	\$38.66	\$45.64
45%	\$40.33	\$46.18	\$37.35	\$39.78	\$46.45
50%	\$41.91	\$48.06	\$38.78	\$41.34	\$50.57
55%	\$43.51	\$49.39	\$40.21	\$42.90	\$53.16
60%	\$44.74	\$51.00	\$41.37	\$44.12	\$53.97
65%	\$46.24	\$55.67	\$42.77	\$45.60	\$54.78
70%	\$47.81	\$56.82	\$44.24	\$47.16	\$56.60
75%	\$49.65	\$57.53	\$45.92	\$48.97	\$57.95
80%	\$52.36	\$59.38	\$48.32	\$51.61	\$60.97
Mean	\$43.50	\$51.20	\$40.20	\$42.90	\$50.28
Compa- Ratio	-12.6%	-2.7%	-10.0%	-6.9%	+7.1%

	Human Resources Analyst	Human Resources Director	Information Services Coordinator	Information Services Director	Network Specialist
Current Scale					
Grade	S18	S26	S19	S27	S20
Minimum	\$23.12	\$34.15	\$24.27	\$35.85	\$25.49
Midpoint	\$28.71	\$42.43	\$30.15	\$44.54	\$31.66
Maximum	\$34.31	\$50.70	\$36.04	\$53.23	\$37.83
Market Percentiles					
20%	\$22.92	\$40.64	\$25.91	\$36.78	\$22.57
25%	\$23.35	\$43.04	\$27.07	\$38.86	\$23.36
30%	\$24.10	\$43.87	\$27.98	\$42.30	\$25.28
35%	\$24.43	\$44.39	\$29.01	\$43.97	\$25.59
40%	\$25.81	\$46.50	\$30.02	\$44.14	\$25.94
45%	\$26.57	\$49.15	\$31.02	\$44.41	\$26.56
50%	\$27.75	\$50.02	\$32.14	\$46.94	\$28.49
55%	\$29.03	\$50.80	\$33.21	\$49.39	\$30.31
60%	\$29.73	\$51.29	\$34.24	\$50.60	\$31.40
65%	\$30.18	\$54.22	\$35.42	\$52.46	\$32.52
70%	\$30.52	\$55.70	\$36.66	\$53.17	\$32.70
75%	\$33.14	\$59.04	\$37.99	\$54.85	\$33.25
80%	\$34.18	\$61.66	\$39.77	\$59.66	\$35.27
Mean	\$28.25	\$50.48	\$33.19	\$49.22	\$29.23
Compa- Ratio	+3.5%	-15.2%	-6.2%	-5.1%	+11.1%

	Plant Services Manager	Program Manager	Public Works Director	Recreation Programs Supervisor	Sanitation & Fleet Manager
Current Scale					
Grade	\$22	\$17	\$29	\$14	\$22
Minimum	\$28.10	\$22.03	\$39.54	\$19.03	\$28.10
Midpoint	\$34.90	\$27.35	\$49.12	\$23.63	\$34.90
Maximum	\$41.71	\$32.68	\$58.69	\$28.22	\$41.71
Market Percentiles					
20%	\$28.21	\$23.52	\$41.35	\$21.89	\$31.28
25%	\$28.89	\$24.07	\$43.24	\$22.71	\$32.89
30%	\$30.40	\$24.14	\$43.91	\$23.47	\$33.99
35%	\$33.43	\$24.21	\$45.87	\$24.37	\$35.20
40%	\$34.49	\$26.72	\$47.19	\$25.34	\$36.27
45%	\$34.93	\$28.77	\$49.13	\$26.26	\$37.36
50%	\$34.98	\$29.54	\$49.34	\$27.15	\$38.80
55%	\$35.63	\$30.03	\$50.30	\$27.96	\$40.23
60%	\$36.23	\$31.03	\$51.70	\$28.88	\$41.39
65%	\$37.21	\$31.50	\$53.69	\$29.90	\$42.79
70%	\$40.71	\$31.90	\$57.41	\$30.97	\$44.26
75%	\$41.93	\$32.50	\$58.69	\$32.03	\$45.94
80%	\$42.46	\$34.61	\$61.26	\$33.34	\$48.34
Mean	\$35.75	\$28.99	\$51.42	\$27.93	\$40.22
Compa- Ratio	-0.2%	-7.4%	-0.5%	-13.0%	-10.0%

	Senior Accountant	Senior Planner	Software Application Specialist	Systems Analyst	Team Leader II
Current Scale					
Grade	S19	S19	S18	S18	S18
Minimum	\$24.27	\$24.27	\$23.12	\$23.12	\$23.12
Midpoint	\$30.15	\$30.15	\$28.71	\$28.71	\$28.71
Maximum	\$36.04	\$36.04	\$34.31	\$34.31	\$34.31
Market Percentiles					
20%	\$26.93	\$27.29	\$26.21	\$26.29	\$26.44
25%	\$28.18	\$28.56	\$27.39	\$27.48	\$27.64
30%	\$29.12	\$29.52	\$28.31	\$28.40	\$28.57
35%	\$30.18	\$30.59	\$29.35	\$29.44	\$29.61
40%	\$31.21	\$31.62	\$30.36	\$30.46	\$30.63
45%	\$32.22	\$32.64	\$31.36	\$31.46	\$31.64
50%	\$33.40	\$33.84	\$32.50	\$32.61	\$32.79
55%	\$34.54	\$35.01	\$33.60	\$33.71	\$33.90
60%	\$35.60	\$36.07	\$34.63	\$34.74	\$34.94
65%	\$36.82	\$37.31	\$35.82	\$35.94	\$36.14
70%	\$38.10	\$38.61	\$37.08	\$37.19	\$37.41
75%	\$39.49	\$40.02	\$38.42	\$38.55	\$38.77
80%	\$41.39	\$41.96	\$40.23	\$40.37	\$40.61
Mean	\$34.53	\$34.99	\$33.58	\$33.69	\$33.88
Compa-Ratio	-9.7%	-10.9%	-11.7%	-11.9%	-12.4%

	Team Leader III	Youth Intervent. Counselor
Current Scale		
Grade	S20	S13
Minimum	\$25.49	\$18.13
Midpoint	\$31.66	\$22.51
Maximum	\$37.83	\$26.89
Market Percentiles		
20%	\$29.06	\$20.49
25%	\$30.49	\$21.20
30%	\$31.51	\$21.91
35%	\$32.65	\$22.75
40%	\$33.69	\$23.71
45%	\$34.74	\$24.61
50%	\$36.05	\$25.42
55%	\$37.33	\$26.14
60%	\$38.44	\$27.02
65%	\$39.75	\$27.98
70%	\$41.12	\$28.99
75%	\$42.65	\$29.96
80%	\$44.80	\$31.11
Mean	\$37.32	\$26.11
Compa- Ratio	-12.2%	-11.4%

Proposed Salary Schedules

A recommended salary scale for 2080-hour employees is shown in Table 29.

It is recommended that the minimum rate of pay for 2080-hour employees be no less than the living wage for Martin County. Utilizing the Massachusetts Institute of Technology's Living Wage Calculation, the living wage for Martin County is \$12.29 (livingwage.mit.edu/counties/12085). This is higher than the 2019 minimum wage for Florida of \$8.46.

The spread between the minimum and maximum salary was set to 60%, an industry standard value, to allow for growth opportunities.

The number of pay grades was set to 25 to accommodate the range of salaries. The Ladders, i.e., the distance between grades, was set to be 5.0%. Larger Ladders were included to increase the incentive for employees to seek positions of greater responsibility and to make it financially beneficial.

For 2496-hour Fire Rescue Battalion Chiefs, a recommended salary scale is shown in Table 30. Market research indicates that a 75% spread is typical. The minimum of the range was set at the 20th percentile of the external market and ensures that there is sufficient separation between the hourly rate of the Battalion Chiefs and the Fire Chief.

Table 29 – Proposed Salary Schedule – All Full-Time, Non-Bargaining Employees (2080 hours)

Grade	Annual Min	Annual Mid	Annual Max	Hourly Min	Hourly Mid	Hourly Max
1	\$25,563	\$33,232	\$40,901	\$12.29	\$15.98	\$19.66
2	\$26,841	\$34,894	\$42,946	\$12.90	\$16.78	\$20.65
3	\$28,183	\$36,638	\$45,093	\$13.55	\$17.61	\$21.68
4	\$29,593	\$38,470	\$47,348	\$14.23	\$18.50	\$22.76
5	\$31,072	\$40,394	\$49,716	\$14.94	\$19.42	\$23.90
6	\$32,626	\$42,414	\$52,201	\$15.69	\$20.39	\$25.10
7	\$34,257	\$44,534	\$54,811	\$16.47	\$21.41	\$26.35
8	\$35,970	\$46,761	\$57,552	\$17.29	\$22.48	\$27.67
9	\$37,768	\$49,099	\$60,430	\$18.16	\$23.61	\$29.05
10	\$39,657	\$51,554	\$63,451	\$19.07	\$24.79	\$30.51
11	\$41,640	\$54,132	\$66,624	\$20.02	\$26.02	\$32.03
12	\$43,722	\$56,838	\$69,955	\$21.02	\$27.33	\$33.63
13	\$45,908	\$59,680	\$73,453	\$22.07	\$28.69	\$35.31
14	\$48,203	\$62,664	\$77,125	\$23.17	\$30.13	\$37.08
15	\$50,613	\$65,797	\$80,981	\$24.33	\$31.63	\$38.93
16	\$53,144	\$69,087	\$85,030	\$25.55	\$33.22	\$40.88
17	\$55,801	\$72,542	\$89,282	\$26.83	\$34.88	\$42.92
18	\$58,591	\$76,169	\$93,746	\$28.17	\$36.62	\$45.07
19	\$61,521	\$79,977	\$98,433	\$29.58	\$38.45	\$47.32
20	\$64,597	\$83,976	\$103,355	\$31.06	\$40.37	\$49.69
21	\$67,827	\$88,175	\$108,523	\$32.61	\$42.39	\$52.17
22	\$71,218	\$92,584	\$113,949	\$34.24	\$44.51	\$54.78
23	\$74,779	\$97,213	\$119,646	\$35.95	\$46.74	\$57.52
24	\$78,518	\$102,073	\$125,629	\$37.75	\$49.07	\$60.40
25	\$82,444	\$107,177	\$131,910	\$39.64	\$51.53	\$63.42

Table 30 – Proposed Salary Schedule – Fire Rescue Battalion Chiefs only (2496 hours)

Grade	Annual Min	Annual Mid	Annual Max	Hourly Min	Hourly Mid	Hourly Max
BAT	\$67,791	\$93,213	\$118,635	\$27.16	\$37.35	\$47.53

Proposed Internal Equity

In Table 31, the resulting proposed internal equity for the City is presented.

Table 31 – Proposed Internal Equity

Grade	Title
1	Custodian Laborer I Laborer II P/T Leisure Driver
2	Groundskeeper P/T Office Assistant
3	On Call Recreation Leader P/T Athletic Coordinator P/T Parking Enforcement Specialist P/T Recreation Leader
4	Equipment Operator I Nursery Worker
5	Afterschool Program Leader Sanitation Worker
6	Customer Service Representative I P/T Customer Service Representative I P/T Lead Leisure Driver W/WWTP Operator Trainee
7	Auto Service Worker Customer Service Representative II Fiscal Assistant I Maintenance Mechanic P/T Crime Analyst P/T Fiscal Assistant Special Events & Tourism Technician Utility Service Worker II
8	Customer Service Representative III Division Assistant Meter Reader Payroll Specialist Permit Specialist Sanitation Equipment Operator I Senior Maintenance Mechanic System Specialist Team Leader I W/WWTP Operator I WWTP Operator I

Grade	Title
9	Accounts Payable Specialist P/T Police Dispatcher Permit Coordinator Police Dispatcher I W/WWTP Operator II Sanitation Equipment Operator II Utility Maintenance Mechanic
10	Business Tax Specialist Waste Water Collections Systems Specialist Water Systems Specialist Youth Intervention Counselor
11	Administrative Office Specialist - CS Civilian Enforcement Officer Executive Administrative / CRA Specialist Human Resources Specialist Logistics & Support Technician Police Dispatcher II Utility Senior Maintenance Mechanic W/WWTP Operator III Water Distribution System Specialist Water Reclamation System Specialist
12	Administrative & Program Coordinator Assistant to City Clerk Customer Service Coordinator Fire Inspector Infrastructure System Locator Laboratory Analyst P/T Behavioral Program Specialist Police Dispatch Coordinator Recreation Programs Coordinator
13	Building Inspector Executive Secretary to Public Safety Fire Inspector / Investigator Procurement Analyst
14	Accountant Diesel/Gas Mechanic Program Coordinator Public Works Administrative Coordinator Public Works Inspector
15	Executive Assistant to City Manager Human Resources Analyst Instrument/Ctrl/SCADA Analyst

Grade	Title
16	Civil Enforcement Coordinator Community Affairs Liaison Network Specialist Paralegal Senior Accountant Senior Planner Team Leader II Technology Services Specialist
17	Network Supervisor
18	Building Maintenance Superintendent Capital Projects Supervisor Community Services Supervisor Team Leader III
19	Field Services Manager Plant Services Manager Sanitation & Fleet Manager
20	CRA Administrator Technology Services Assistant Manager
21	Public Works Assistant Director/City Engineer Public Works Deputy Director Financial Services Assistant Director
22	Building Official City Clerk Police Captain
23	Community Services Director Development Director Human Resources Director Technology Services Director
24	Fire Chief Police Chief Public Works Director
25	Financial Services Director

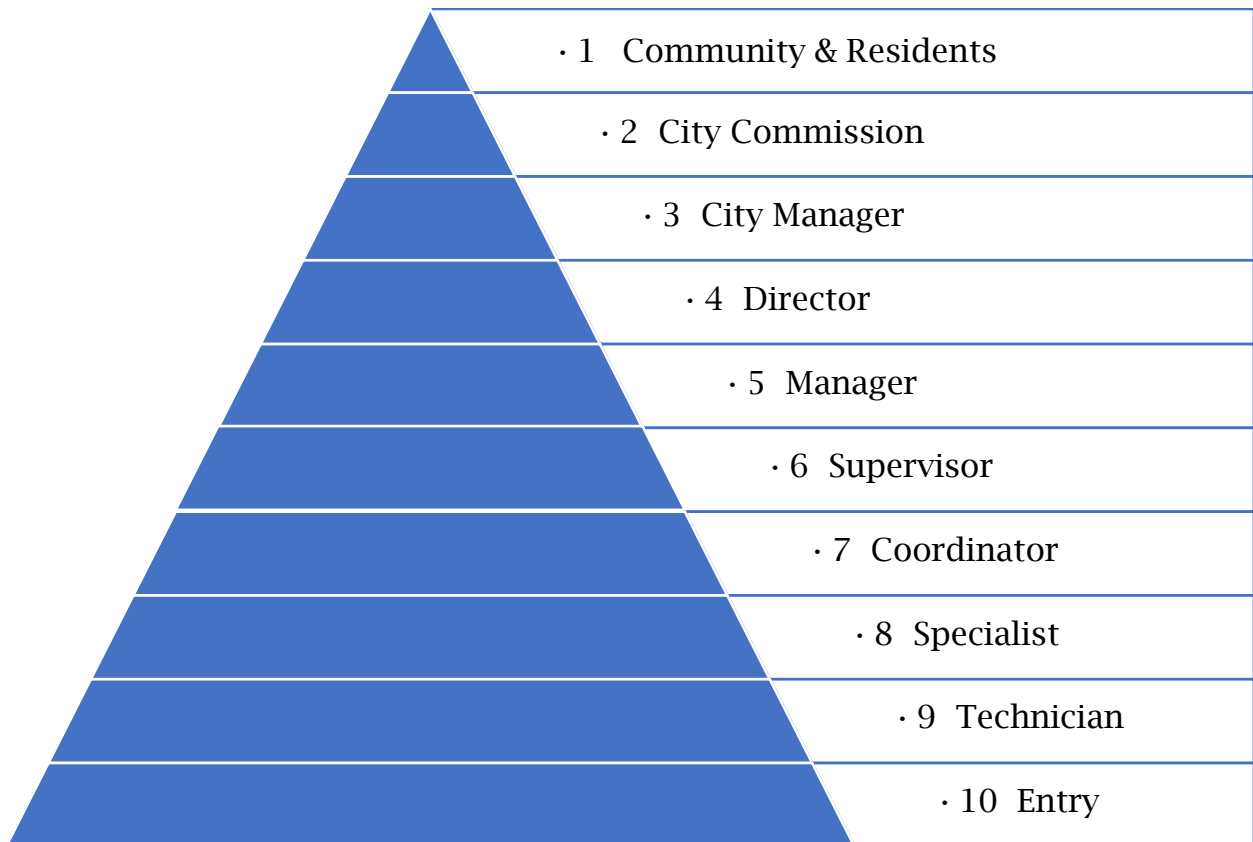
Positions highlighted in **green** were reclassified by the project team.

Positions highlighted in **blue** were new positions created subsequent to the onset of the project. Each position has been classified by the project team considering the internal hierarchy and using the salary scale developed in this project.

Positions highlighted in **red** were retitled to reflect the proposed reclassification as is shown in Table 32.

Recommended Reclassifications

Career Progression Levels



The classification hierarchy can be implemented within each department to standardize career progression and allow employees to see how they fit in the organization as a whole. Placement on the career development chart is not in direct correlation to pay. For some departments, like emergency services, a more industry specific generally accepted hierarchy of positions may be appropriate.

Level	Category	Description
1	Community & Residents	Individuals and businesses that make up the City and pay taxes that support the City and its services.
2	Commission	The governing body that make sure the City provides needed services and is fiscally responsible to its constituents.
3	City Manager	Oversees all day-to-day operations within the organization.
4	Director	Oversees activities and operations for a department.
5	Manager	Manages activities and operations for a program.
6	Supervisor	Monitors, evaluates, and resolves complex internal policies with a short-term tactical approach.
7	Coordinator	Facilitates planning and implements projects for the City.
8	Specialist	Utilizes knowledge and experience in the application of a field to handle complex tasks.
9	Technician	Applies learned skills in day-to-day tasks.
10	Entry	Supports the services offered by the City.

For clarification the following provides more specific definitions of titles:

- Attendant / Aide - This position involves field specific task-oriented work.
- Assistant - This is a support position which relates to office, accounting and finance.
- Lead - This person leads by example. He or she organizes, assigns, makes decisions, and recognizes capabilities of staff in their charge.

While the City can guide employees in their professional growth, factors such as economic circumstances, organizational priorities, and community demands will also impact their career path. As a general trend, employees are taking a more pro-active approach to their own career development and will value an employer who allows for learning and training opportunities as opposed to one that does not.

Table 32 – Recommended Reclassification

Current Title	Classification	Title Change
Administrative & Program Supervisor	Level 7	Administrative & Program Coordinator
Administrative Office Coordinator - CS	Level 8	Administrative Office Specialist - CS
Building Maintenance Coordinator	Level 6	Building Maintenance Superintendent
Business Tax Technician	Level 8	Business Tax Specialist
Capital Projects Coordinator	Level 6	Capital Projects Supervisor
Civil Enforcement Supervisor	Level 7	Civilian Enforcement Coordinator
Community Services Division Manager	Level 6	Community Services Supervisor
Customer Service Supervisor	Level 7	Customer Service Coordinator
Infrastructure Location System Specialist	Level 7	Infrastructure System Locator
Instrument/Ctrl/SCADA Specialist	Level 7	Instrument/Ctrl/ SCADA Analyst
Laboratory Technician	Level 7	Laboratory Analyst
Network Specialist	Level 6	Network Supervisor
P/T Athletic Coordinator	Level 10	P/T Athletic Facilitator
P/T Behavioral Program Specialist	Level 7	P/T Behavior Program Analyst
P/T Crime Analyst	Level 9	P/T Crime Technician
P/T Parking Enforcement Specialist	Level 10	P/T Parking Enforcement Monitor
Permit Technician	Level 8	Permit Specialist
Police Dispatch Supervisor	Level 7	Police Dispatch Coordinator
Procurement Specialist	Level 7	Procurement Analyst
Program Manager	Level 7	Program Coordinator
Recreation Programs Supervisor	Level 7	Recreation Programs Coordinator
Special Events & Tourism Specialist	Level 9	Special Events & Tourism Technician
System Technician	Level 8	System Specialist

Proposed Placement Policy

Data

The South Region Consumer Price Index (CPI) is published monthly by the U.S. Bureau of Labor Statistics and can be found at <http://www.bls.gov/regions/southeast>. The CPI has been a traditional mechanism used by employers to adjust wages to reflect cost of living increases. In December 2008, the CPI for the South Region was 129.099. In December 2018, the CPI was 152.891. This gives an annualized value of 1.71%, or in other words, the cost of living has increased by 1.71% annually for the area.

Accordingly, it is proposed that the CPI be used as the benchmark by which to adjust salaries particularly in the case of hiring new employees, but also for all other non-merit-based salary adjustments. Table 33 illustrates the proposed salary adjustment as a function of the equivalent years of experience.

Table 33 - Equivalent Years

Equivalent Years	Increase
1	1.71%
2	3.44%
3	5.21%
4	7.00%
5	8.83%
6	10.68%
7	12.57%
8	14.49%
8+	15%

Education Equivalent Experience

Using the results of the study, both the CFS algorithm and the results of the external market, a systematic method for placing principally new employees was constructed. The first column presents the minimum education required for a position as specified in the job description. The second column presents the education that a candidate possesses. The CFS algorithm was used to develop a score for the two degrees and results from the external market were examined to construct Table 34.

As an example, for a position that has a minimum requirement of an Associate Degree, a potential employee with a Bachelor's degree would be credited with an additional 2.17 years of experience and would receive an additional 3.74% in compensation above the minimum for the pay grade associated with the position.

Table 34 - Education Equivalent Experience

Minimum Degree Required	Degree Possessed	Increase	Equivalent Years
High School/GED	High School/GED	-	-
High School/GED	Associate	3.47%	2.02
High School/GED	Bachelor	7.34%	4.19
Associate	Associate	-	-
Associate	Bachelor	3.74%	2.17
Associate	Masters	8.42%	4.78
Bachelor	Bachelor	-	-
Bachelor	Masters	4.51%	2.61
Bachelor	Doctorate	9.55%	5.39
Masters	Masters	-	-
Masters	Doctorate	4.82%	2.78
Doctorate	Doctorate	-	-

Certification Equivalent Experience (Non-exempt only)

If a position's job description minimum requirement does not state specific certifications, then 2.02 years of equivalent experience will be granted to a person who possesses a certification that is seen as a benefit of the City for the position upon approval by the Department Head and Human Resources. This is equivalent to having earned an Associate's Degree when a High School/GED is required.

New Hire Salary

For a newly hired employee, it is recommended that years of experience, education level, and certifications be considered when determining fair pay. It is recommended that a new employee should be hired at the minimum of the pay grade with additional compensation for relevant work experience as indicated in Table 33, additional relevant education as indicated in Table 34 for general employees, and certifications as specified in the preceding section. It is recommended that the maximum total adjustment be 15% above the minimum for the grade.

Promotion

In the case of a promotion, it is recommended that the determination of an employee's new salary should follow the same procedure as a new hire. An exception would be if the procedure yielded a new salary less than 4.51% above the employee's existing salary. In such cases, it is recommended that the new salary of the employee be 4.51% above the existing salary which would be the same rate as an employee having earned a Master's Degree when only a Bachelor Degree is required for the position.

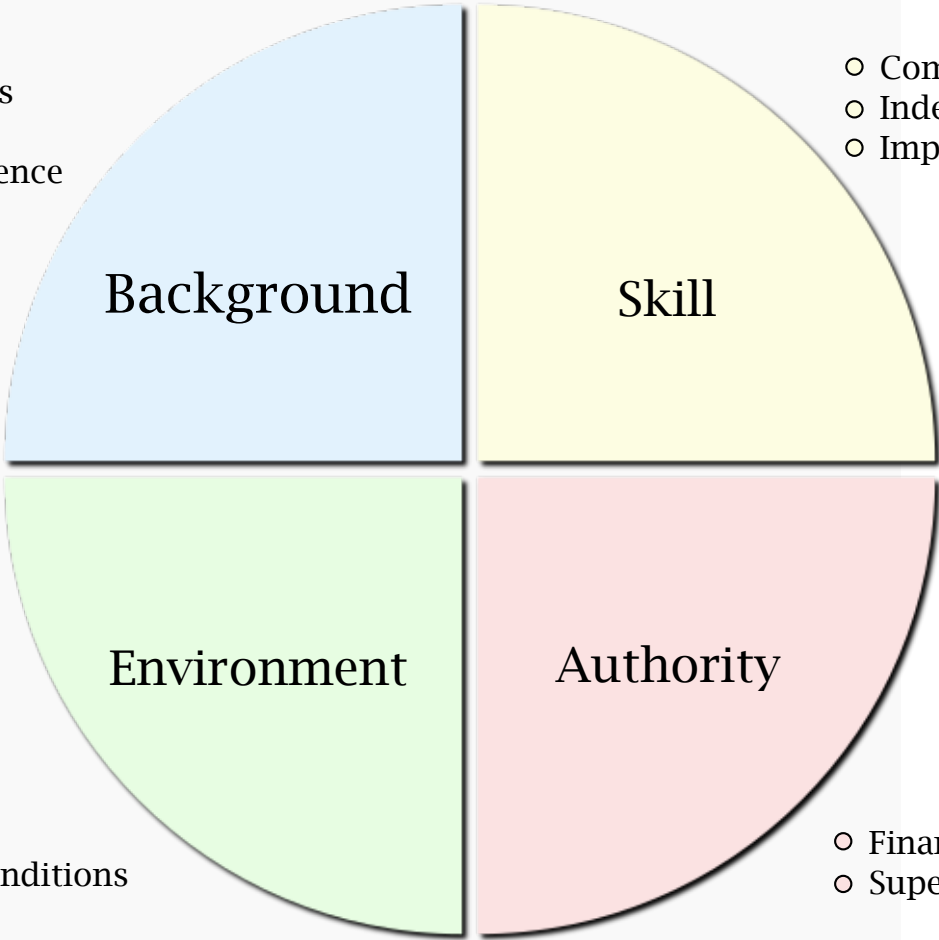
Existing Employees

It is recommended that additional compensation be given to employees who earn additional relevant degrees or receive additional relevant certifications be compensated in a similar fashion as new employees. Additional compensation however should only be given for degrees and certifications that is approved by the Department Head and Human Resources.

Position Vantage Point



- Education
- Certifications
- Work Duties
- Work Experience



- Complexity
- Independence
- Impact

- 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

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

Background (cont.)

Work Duties

(Importance (1 highest/10 lowest), Percentage of time (0 to 100), and Task Description

1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>
9	<input type="text"/>	<input type="text"/>
10	<input type="text"/>	<input type="text"/>

Your Relevant Work Experience

In Current Job Title with Current Employer (years)	<input type="text"/>
In All Job Titles with Current Employer (years)	<input type="text"/>
In Current Job Title with All Employers (years)	<input type="text"/>
Min Required for Current Job Title (years)	<input type="text"/>

Comments

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

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

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

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

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

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.

Comments

PROPOSAL for
CITY OF
ISLE OF PALMS

WAGE & COMPENSATION
ANALYSIS

RFP #2020-07

Nancy McCartney, MBA, SHRM-CP, PHR
HR Bridging, a division of McCartney Resources, LLC
(864) 230-7744 Cell | Nancy@McCartneyResources.com
www.HRBridging.com | (866) 477-8728

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1. COVER PAGE

- a. HR Bridging, a division of McCartney Resources, LLC is an S-Corporation and woman-owned business. Incorporated in April 2016, we are a multi-state HR consulting firm supporting clients in the Carolinas and in Georgia.

www.HRBridging.com

Mailing Address: P.O. Box 653, Greenville, SC 29602
Physical Address: 202 Hamilton Forest Drive, Easley, SC 29640

- b. Nancy McCartney Fuller, Founder / Sole Business Owner
CEO / President of HR Bridging, a division of McCartney Resources, LLC
Main No.: (866) 477-8728
Direct Cell/Nancy: (864) 230-7744
Emails: Nancy@HRBridging.com *or* Nancy@McCartneyResources.com
- c. Our team of four (4) experienced professionals (see profiles herein) work from individual virtual offices in the Upstate of Greenville and surrounding rural areas, giving each the opportunity and flexibility to be on-site with clients, ensuring projects are completed timely and customer support provided.
- d. Proposal Date: November 4, 2020

Our commitment to you, the client...

EFFECTIVE AND ONGOING COMMUNICATION!

To ensure continuous and informative project updates, our communication model includes weekly Zoom calls [and/or emails] on project highlights, interactive engagement, status of each phase of the project and next steps. You, the team, will know the progress and status of your project!

Additionally, the project includes meetings in a variety of formats such as on-site, interactive webinars, conference calls, and others that best fit you as the client. These meetings are an integral part of our model of services to ensure expectations are being met and a collaboration of support is developed.

Our interactive approach with the City's team!

2. TRANSMITTAL LETTER

HR BRIDGING, a division of
McCartney Resources, LLC

November 4, 2020

For,
City of Isle of Palms
(the “City”)



As your HR consulting firm focusing on your Wage & Compensation Analysis project, we believe in a blended team approach working closely with the City’s project team and key contributors identified to participate in the project – a collaborative and interactive style as aligned with the City’s objectives:

- *Ensure fair and equitable compensation relationships with the organization.*
- *Maintain pay equity compliance.*
- *Ensure competitiveness with the external market.*
- *Enable easy maintenance by the City staff post implementation.*

On behalf of HR Bridging’s experienced and professional team, we certainly understand the City’s need to be competitive for top talent in the marketplace, including recruitment, development of your workforce and retention while offering employees a fair and competitive total reward package while staying compliant.

With our combined experience to include directly-related compensation and wage projects, we believe we are best qualified for your project because...

- ✓ Key in understanding your workforce needs that complement the business objectives of the City, **we collaborate with you to learn your unique work environment** as well as the citizens and visitors the City serves.
- ✓ Our experience **spans across multiple industries** to include current and previous compensation studies for municipalities (please see references). As consultants with combined leadership experience, Nancy, Chris and Jewell possess solid experience in strategically planning, leading and implementing competitive compensation initiatives with internal equity and compliance key focus areas. As consultants, we continue to deliver effective compensation programs for both private and public clients. **We do the work for you!**
- ✓ A value-add to organizational excellence, whether a private or public entity, our consultants provide a full range of classification and compensation services in a program format that complements the client’s Total Reward package for their employees. **This breadth of experience and depth of information provides you with marketplace information, practical solutions and forward-thinking strategies that can be**

implemented for a competitive program. We are hands-on, working in collaboration with your team, advising and guiding through to implement of your plan. Functions include (more detailed herein):

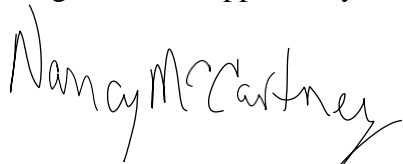
- Job Audit & Analysis
- Labor Market Survey & Data Benchmarking
- Analysis of Competitive Market Data, Compensation Trends & Pay Practices
- Design & Implementation of Salary Grades & Ranges
- Compliance with Pay-Related Regulatory Obligations (FLSA)
- Pay Equity Analysis
- Final Report with Findings & Recommendations
- Strategic Planning for Implementation

- ✓ Because we only submit proposals for and accept contracts we can fully support and deliver on, clients receive dedicated time and attention to ensuring objectives are timely met and implementation is successful.

Without exception, our classification and compensation projects have successfully met and exceeded intended commitments; communications were successful with employees, supervisors, management; and we were able to assist each organization in successfully implementing recommendations. All studies were brought to completion within stipulated time limits and proposed budgets.

Our list of references is indicative of our firm's reputation as being a quality organization that can be relied on for producing comprehensive, sound, and cost-effective recommendations and solutions. ***We are your local HR consulting firm.*** HR Bridging, a division of McCartney Resources, LLC, has a reputation for being "hands on" with the ability and expertise to implement recommendations and best practices with a focus on compliance through to completion.

Our goal is to provide professional and technical consulting assistance with integrity, honesty and a commitment to excellence. **This proposal is valid for 120 days after the proposal due date.** Thank you again for the opportunity to submit our Proposal.



Nancy A. McCartney, MBA, PHR, SHRM-CP
CEO / President
Nancy@HRBridging.com
Cell: (864) 230-7744

Each member of the team has successfully contributed to client project work as well as operational management projects to include reorganizations, compliance initiatives such as employee handbook and customized policies and programs, compensation studies, HR assessments, job description analysis and development as well as a full array of HR support and guidance. *Meet your experienced, qualified HR consultants:*



Nancy McCartney, MBA, SHRM-CP, PHR
CEO / President
Sr. Project Consultant & HR Business Partner



Christine Stapleton, PHR, SHRM-CP
Sr. Project Consultant &
HR Business Partner



Jewel Bunche, SHRM-SCP
Project Consultant & HR Business
Partner



Carolina Venegas
Sr. HR Assistant & Project Coordinator

HR Bridging Affiliates / Resources:

Diversity/Inclusion Advisor: Laura Bogardus, Ph.D.

Legal Counsel: Leah Cromer, Esq. of Palmetto Legal Solutions, LLC



HR Bridging, a division of McCartney Resources, LLC

www.HRBridging.com

Office No. (866) HRSTRAT or (866) 477-8728

Nancy McCartney, MBA, PHR, SHRM-CP Client Business Partner / Co-Lead



Nancy has more than 15+ years of human resources and leadership experience, which she utilizes to lead and guide the HR Bridging team. Founder of McCartney Resources, LLC and now HR Bridging, combined multi-industry and multi-state experience have successfully designed and supported strategies with business initiatives and goals implementing various HR programs, policies and procedures. Nancy's expertise is building HR competencies through organizational development, designing and implementing strategies to reduce liability and provide workplace solutions for growing and expanding businesses. HR services are designed to fit an organization's culture, whether enhancing an HR program or designing an effective HR infrastructure.

Earning her MBA with a focus in Finance from the University of South Carolina, complemented with an undergraduate degree in Business/Human Resources, she is an active member of the HR community, serving as the 2018 President of the Association and Chairman of the Board of Directors for Greenville Society of Human Resources (GSHRM), SHRM State Council leader as well as a graduate of the Leadership of South Carolina program, striving to enhance and support economic growth efforts. SHRM industry certifications include Certified HR Professional (SHRM-CP and PHR), Veterans @ Work and Employing Abilities [Disabled] Workers @ Work.

Christine Stapleton, PHR, SHRM-CP
Sr. Project Consultant/HR Business Partner



Chris also brings more than 15+ years of human resources and operational experience specializing in small to mid-sized companies. Designing and developing solutions and strategies, Chris' broad experience offers professional guidance and project deliverables in organizational development aligning with company goals and strategies.

In addition to Chris' professional HR certifications, she is also certified in SHRM's Veterans at Work Program. A current Greenville Society for Human Resources Management Association (GSHRM) member and a former GSHRM Board member, as well as SHRM State Council member, Chris has served on several different committees contributing to the industry. SHRM industry certifications include Certified HR Professional (SHRM-CP and PHR), Veterans @ Work and Employing Abilities [Disabled] Workers @ Work.

Jewel Bunche, SHRM-SCP
Sr. Project Consultant/HR Business Partner



Throughout Jewel's HR career, she has served in leadership and management roles focused on recruitment and retention strategies, orientation and onboarding programs, employee relations and performance management systems. Well-versed in a wide range of HR issues involving the workforce and organizational development, Jewel brings 10+ solid years of HR expertise that complements any organizations existing functions while advising and recommending new initiatives in the competitive market.

A relationship leader with broad industry experience, she is passionate about training and development that delivers impactful organizational results. Jewel holds her bachelor's degree from North Carolina State University in Economics and is currently working to review her SHRM-SCP from SHRM.

Carolina Venegas
Sr. HR Assistant

[Bilingual, Fluent Spanish]

Carolina possesses a solid business background to include Human Resources generalist support, excellence in customer service, HRIS implementation specializing in payroll processes and platforms. Carolina provides direct support with client project management needs as well as recruitment and retention services.

Along with applying her Human Resources generalist knowledge, Carolina has a solid understanding of best practices as a former supervisor and as an HR team member. Carolina is a key contributor who began her career more 15 years ago after successfully completing her Executive Secretary designation from the International Business College.

3. STATEMENT OF QUALIFICATIONS

In addition to the teams combined experience in multiple industries, HR Bridging's compensation and wage analysis projects include directly-related experience specific to the following clients:

City of York: **Currently working!** Contracted by the City via RFP to review current compensation structure, conduct market analysis of individual job titles and classifications, update all job descriptions and provide recommendations for future compensation strategies to support competitiveness and talent management. The study measures and provides an analysis of employee survey results, the base salary, pay/step plans, along with other incentive-based compensation programs. To ensure the project's validity and applicability, HR Bridging is currently conducting a thorough, interactive compensation analysis using **similar-sized municipalities** for comparison and recommended comparator cities for consideration.

City of Folly Beach (which has like-geographical high cost living areas in and around Charleston County): **Project completed!** Contracted by the City via RFP to review current compensation and benefits structure, conduct market analysis of individual job titles and classifications, and provide recommendations for future compensation strategies to support competitiveness and talent management. The study measured and provided an analysis of employee survey results, the base salary, pay/step plans, City and State provided medical benefits packages along with other incentive-based compensation programs. To ensure the project's validity and applicability, McCartney Resources (now known as HR Bridging) conducted a thorough, interactive compensation and benefits analysis using **similar-sized municipalities (SC, NC and GA)** for comparison and recommended comparator cities for consideration.

City of Myrtle Beach, Grand Strand Humane Society: **Project completed!** Contracted by the City via RFP, the Grand Strand Humane Society receives substantial financial support from the City of Myrtle Beach who has a community-vested interest in its' success [along with appointed Board members]. McCartney Resources (now known as HR Bridging) completed a contract assessing and recommending competitive changes to operational functions (e.g., organizational structure, position description development, compensation review and survey (selected positions), review and recommendations for Standard Operating Procedures, etc.) to include financial stability of the organization as well as an assessment on the effectiveness of the Board of Directors.

Girl Scouts of South Carolina – Mountains to Midlands (Non-Profit, Governance Regulated): **Projects completed!** Retained contract with multiple responsibilities to include compensation management, annual benefits' analysis and a complete council reorganization to better support operations and talent management with a focus on retention and growth. An intragryal part of operations management and Human Resources compliance and processes, supporting critical efforts to enhance a solid, competitive HR infrastructure.

As a team with solid, directly-related experience to include successful completion of compensation projects, our ability to provide expertise is combined with our experience, skills and education. These attributes, along with our commitment to excellence in our field offers you a dedicated team of HR professionals.

4. PROJECT PLAN – STATEMENT OF METHODS & PROCEDURES

As your consulting firm, we believe in a blended team approach working closely with the City's project team and key contributors identified to participate in the project – a collaborative and interactive style. Our approach is a fluid workplan supported by methodologies as aligned with the City's objectives and deliverables:

A. **The Kick-Off Meeting / Identifying Compensation Goals:** On-Site with the City – A Strategic Review, Outlining the Detailed Plan

Our client-centered approach with an initial Kick-Off Strategy Meeting ensures our clear understanding of the City's mission as aligned with project parameters and the City's expectation of deliverables, enhancing accurate intake and output of information. We refer to this as our benchmark list to support and guide, outlining details. Fostering this partnership with you, the meeting creates and supports collaborative and interactive methods resulting in a more comprehensive, **forward-thinking study**.

This key meeting will include identifying the City's project team, contract administrator, and reporting relationships. Designed as a briefing session with the City's team, including review of supporting documentation for the project as well as review and customization of the workplan, we will identify subsequent tasks to be accomplished as well as reaffirm the primary objectives and specific end deliverables within the targeted timeline for satisfactory completion of the overall assignment.

B. **Objectives with Deliverables:**

a) **Duties Analysis and Job Classifications – Compliance Driven**

This detailed compliance-driven methodology begins with analyzing the City's 39 individual job titles within the current classification framework and through a historical perspective. Reviewing and understanding the system and each position description through a comprehensive process of job analysis and evaluation, including review of existing documentation, position description questionnaire completion, employee interviews, management interviews, analysis of existing positions and working situations, analysis of levels of duties and responsibilities, and other professional methods, as appropriate, that will also provide insight to the culture and practices of the City. Listed is a more detailed breakdown (*please keep in mind, we do all the work for you*):

- Develop and launch an employee survey (both electronic and manual for ease and efficiency) to identify key responsibilities and accountabilities as perceived by the employee; conduct follow-up interviews with employees including supervisors and management.
- Validate data with supervisor reviewing job functions [or the hybrid job with combined responsibilities] for accuracy and how the responsibilities contribute to the essential functions of the job.
- Ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are clearly detailed and leveled for progression opportunities (e.g., promotions, succession planning, supportive of performance management system, etc.).
- Document definitions of job classifications, responsibilities and accountabilities, and minimum required and preferred qualifications such as education, prior work experience, knowledge, skills,

abilities, licenses, certifications, and physical demands comparing results in the marketplace for competitiveness.

- Review recommendations and results with project team; identify and recommend revisions or updates within the classification structure (guide) to better serve the City's needs with a focus on state and Federal regulatory compliance as defined by the Fair Labor Standards Act ("FLSA"), Americans with Disabilities Act ("ADA") requirements, and others to include any applicable standards with Occupational Safety & Health Administration ("OSHA"), etc.
- Provide supporting documentation throughout the study, on classification concepts and distinguishing characteristics, as well as the delivery of final reports and recommendations to guide the organization in implementing, managing, and maintaining the classification system.

Information is downloaded into Excel to better organize and identify similarities, differences and other key aspects with the essential functions of each respective position. Graphs are developed to support further clarification (based on results) and clarify responsibilities. Often, survey results also support any future strategic planning from employee feedback gathered.

It also provides the "maintenance system" for the City to reference and utilize for future changes and growth. It is a working document, utilized for any future review or revisions of positions whether new or enhanced and in support of the City's objectives:

b) Evaluation of Existing Job Descriptions – Updating with Recommendations

A critical part of the project that identifies and supports wage classifications and employee pay [pay ranges], this is an important step in supporting the City's RFP initiatives. Through collecting updated information from survey [questionnaires], employee interviews and other relevant contributions and documents, job description revisions as applicable will be made in all categories.

Consultants will also review, analyze, and update distinguishing characteristics (such as competencies), supervision level (if any) and any special requirements including licensing and certification (e.g., public safety, code enforcers, procurement, IT, etc.). Identifiers will also include relevance and hierarchical consistency to ensure clear reporting path (matching the City's organizational chart) and as aligned with performance management.

Our job analysis method is the whole position analysis approach. Objective factors in updating and developing job descriptions include:

- Key Accountabilities (Performance Management)
- Duties / Responsibilities (Performance Standards)
- Required Experience (Qualifications)
- Education, Training, and Certifications/Licenses
- Competencies for Success (Behaviors)
- Problem Solving/Ingenuity
- Attention/Stress (Concentration/Time Pressure & Interruptions)
- Independence of Action/Responsibility
- Contacts with Others/Internal/External
- Supervision Received and/or Given to Others
- Consequences of Action/Decisions Made on the Job
- Equipment and Technology Requirements/Used
- Working Conditions/Physical Demands and any Environmental Exposures

c) Compensation Study / Marketplace Comparisons with a Community Data Analysis

As your consultants, we go beyond a competitive labor study... we include community demographics as well. This means you will have demographic information of the community such as area economic impact, forecasting index that includes cost of living comparisons, home values and much more. With the compensation comparison, this part of the study will include comparable municipalities, area competitors for key positions, as well as information from the SC Municipal Association and the Bureau of Labor Statistics – all data recorded individually and averaged for comparison.

During the Kick-Off meeting our teams will collaborate on benchmarking factors that include the City's alignment with the external labor market. Classifications of jobs will also be confirmed so that the benchmark will reflect a true, solid comparison with the breakdown of departments and functions – General Government (Municipal Court, Finance & Human Resources), Recreation, Public Works, Building, Planning & Zoning, Police and Fire.

Marketplace Competition – A critical step, the following factors are typically applied to identify appropriate workforce competitor factors based on the City's benchmark list as well as any recommendations by consultants. Factors reviewed and considered include:

- **Organizational Type and Structure** – In evaluating the City's external competitors and/or comparable municipalities, understanding the role of each organization is somewhat unique, particularly regarding its relationship to the citizens it serves and level of service expectation a list will be comprised to support the study. During this interactive process, the City's current/previous list of marketplace competition as well as advantages and disadvantages of including them or others will be utilized in the comparison.
- **Marketplace Competitors / Labor Market** – While developing a list of marketplace competitors, a variety of data is utilized for analysis. The reality of today's labor market is that many organizations are in competition for the same pool of qualified employees. Therefore, the geographic labor market area (where the City may be recruiting from or losing employees to) will be taken into consideration when selecting potential marketplace competitors.
- **Similarity of Population Served, City Demographics, and Operational Budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services. Supports the marketplace study and comparable comparisons.
- **Cost-of-Living Indexes** – The price of housing and other cost-of-living related factors are contribute in determining labor markets. We will review and record overall cost-of-living variables, median house prices, and median household incomes to determine the appropriateness information and data.

Benchmark Classifications – In the same collaborative manner as described above, we will work with each department's team to select benchmark classes which are ordinarily chosen to reflect a broad spectrum of class levels (e.g., a supervisory level, a lead, an individual contributor, etc.). In addition, classes that are most likely to be found in other similar municipalities, provide valid data samples for analysis. Internal relationships will be determined between the benchmarked and non-benchmarked classifications and internal equity alignments will be made for salary recommendation purposes. All data will be recorded in Excel so that the City may utilize the data to include any progression and growth initiatives once the project is completed. A useful, common tool!

Compensation Data to Be Collected – In addition to base salaries, benefit data elements will also be gathered for information purposes as the primary focus is on base compensation. This includes variety of information as shared during the survey, recorded on the data worksheet for information and consideration as well. Additional data gathered externally may include retirement plans, healthcare programs, leave policies and other factors at times that are considered compensation (variable vs. non-variables such as cell phone allowance, use of vehicles, etc.). While the City may offer PEBA coverage, outside competitors may offer different coverage and perks that the City may be interested in strategically (besides the comparison factors within this study).

Marketplace Data Collection – Applying our knowledge and prior experience directly related to the City’s project, we identify preliminary “matches” and communicating by telephone, or sometimes in person, with knowledgeable individuals to answer specific questions. We find that the information collected using these methods yield **a high rate of validity, allowing us to substantiate the data for employees, management, and governing bodies**. We also pull commonly referenced data from published local, state and national resources. A variety of information for the study.

Analysis and Preliminary Review of Data – Data will be recorded in Excel, offering ease of interpretation and continuous use. The information will be presented in a format that will identify comparable marketplace positions used for each classification comparison. Information will be calculated based upon both average and median figures allowing the City to make informed compensation decisions. Other elements of the compensation survey report will include organizations surveyed; comparable class titles; salary range maximum/control point; and percent of the City’s salary range is above/below the market values.

After preliminary review by the City’s project team, consultants will meet with the project team and other stakeholders (including management and employees as identified) to clarify data, and to answer questions and address concerns. This provides an opportunity for the project team and other stakeholders to review and question recommended benchmark competitive matches. If questions arise, we conduct follow-up analysis to reconfirm our original analysis and/or make corrections as appropriate.

The goal in this next critical step in the process is to identify any potential internal equity and compaction issues. This will identify opportunities to better align any compensation disparities with the current compensation system as well as alignment for retention and competitiveness. It is a reference tool that can be utilized for strategic planning and budget recommendations:

- ✓ Collect, compile and analyze the market data.
- ✓ Construct model compensation structure(s).
- ✓ Review proposed structure(s) to determine consistency with strategic objectives (and compliance requirements that may need to be better aligned).
- ✓ Recommend implementation options and determine associated costs, considering both single and multi-year implementation schedule options.
- ✓ Facilitate determination of optimum implementation strategy.
- ✓ Develop written communication for supervisors/employees explaining broad study findings and individual impact where applicable.
- ✓ Evaluate and recommend strategy to account for specific geographic cost of living impact within the City of York.

C. Classification and Compensation Administration – Implementing the City’s Plan

- **Develop and Implement a Pay Philosophy (Guiding Principles for a Pay Structure)**
Supporting the City’s HR structure, this offers guiding principles for growth, changes and budgeting forecasts. A reference tool that adjust to the City’s needs and the community served.
- **Recommend and Provide Pay Grade Platforms**
A key tool to ensure future alignment with equity practices, performance management and career progression within the City and each department (whether developing new grades or updating a current compensation grade system).
- **Identify Considerations for Compensation Reviews Going Forward**
Recommendations include best practices with compliance initiatives that supporting forecasting and planning.

D. Content of Work / Presentation

- **Produce an Executive Summary with a Project Overview**
A solid overview with statistics, graphs, findings and recommendations. While the City will retain all detailed information, this summary offers a high-level view of project results.
- **Develop Worksheets and Templates in Useable, Common Formats for the City (e.g., Word, Excel, PowerPoint)**
Key to your investment in our consulting services, we utilize common software tools that can be a resource tool allowing adjustments, comparisons, changes, etc.

Our proposal includes multiple meetings as well as weekly oral and written status/progress updates and recommend a presentation meeting to submit the final reports and supporting documents. All materials, documents, reports and communications will be submitted to and become final property of the City.

A comprehensive Executive Summary with an overview of the project, methodologies and deliverables will be prepared for review prior to finalizing for any requested presentation (e.g., Mayor, City Manager, City Council, etc. as identified by the City).

E. Other Variables in Study – Additional Steps in Project

While the City has a basis in the RFP for the Wage & Compensation Analysis, as stated herein we have added other variables that in our experience help to support such initiatives. Those include:

- **Analyzing compensation data goes beyond a general format** of providing the City with comparable market data... we develop the worksheet that compares averages to your current employee pay (confidentially of course). We will include different viewpoints such as compa-ratios and recommendation for any disparities.
- With the **employee survey**, used to identify **an employee’s perception** of their job, it includes other cultural identifiers such as an employee’s feedback on the benefits’ package, the performance review program, supervisory interaction and other workplace measurables that help an organization in strategic planning for any other changes. A great, unbiased form of employee feedback.
- **Updating Job Descriptions** where we recommend any new best practices and/or compliance considerations that may be taken into account during the project.
- **Expanding the market study** to include not only include competitive compensation information but also community economic statistics such as consumer price indexing, home market values (and what that means for an employee’s wage), cost of living, commute time and other factors impacting recruitment and retention within the City’s geographic region. This information provides not only the City with information that is consistently reviews but offers it from a direction of the employee’s perspective and impact.

- Data collection will include **competitive employee benefits' information**. With compensation and benefits becoming more important to a **Total Reward strategy** in recruiting and retaining employees, an overview of job descriptions, wage structure, pay practices, base pay increases and other relatable variable and non-variable data will be included in the study. Additionally, comparison of benefit plan designs, premium cost, cost-sharing arrangements, retirement plans, time off and flexible schedules plus other trending workplace cultural offerings (as available) will be included.
- The **Executive Summary with findings and recommendations**. A brief overview of the project not only details all aspects impacting compensation but also provides the City with recommendations on addressing any disparity or equitable concerns. Our recommendations go beyond just the report but offers plan options to implement change and the financial impact to the City's budget. We don't just give you the data but share best practices and advise on compliance matters.

F. Work Schedule / Proposed Timeline

Our proposed timeline is an estimated two (2) to three (3) month project, meeting deliverables and expectations as outlined herein as much of the project work is done concurrently. While we don't anticipate a delay, based on the City's staff availability who will contribute to and/or be a part of this project, we do certainly understand the need to be flexible at times when necessary. However, our team will professionally drive the timeline for deliverables and meeting expectations as outlined.

Milestones [concurrent activities] include:

- Employee completion of survey
 - Review job descriptions while analyzing responsibilities, qualifications, reporting structure, compliance, etc.
- Download and analysis of survey results
 - Comparing to job descriptions, recommending any changes/revisions
- Research and analyze demographic information, compiling comparison study
- Conduct salary survey, obtaining compensation information to develop comparison worksheet for analysis
- Compare results with current City's current compensation and grades/bands
- Prepare and finalize analysis with findings and recommendation
- Finalize and present project results with recommendation for implementation strategy

5. CONSULTING FIRM REFERENCES

Directly related experience listed herein (additional client references can be provided) includes those in regulatory industries such as municipality, healthcare, manufacturing, and environmental controls as well as those managed by governance through a Board to clients holding key certifications such as ISO9000 and CARF certification:

➤ **City of York**

Attn: Seth Duncan, MPA, City Manager
10 N. Roosevelt Street
York, SC 29745

Compensation Study

www.YorkSC.gov
sduncan@yorksc.gov

Overview: Contracted by the City via RFP to review current compensation structure, conduct market analysis of individual job titles and classifications, update all job descriptions and provide recommendations for future compensation strategies to support competitiveness and talent management. The study measures and provides an analysis of employee survey results, the base salary, pay/step plans, along with other incentive-based compensation programs. To ensure the project's validity and applicability, HR Bridging is currently conducting a thorough, interactive compensation analysis using similar-sized municipalities for comparison and recommended comparator cities for consideration.

➤ **City of Folly Beach**

Attn: Kathryn Battey, PHR, HR Director
P.O. Drawer 48
Folly Beach, SC 29439

Compensation and Benefits Study

www.CityofFollyBeach.com
kbattey@cityoffollybeach.com
(843) 513-1837 Direct Line

Overview: Project completed! Contracted by the City via RFP to review current compensation and benefits structure, conduct market analysis of individual job titles and classifications, and provide recommendations for future compensation strategies to support competitiveness and talent management. The study measured and provided an analysis of employee survey results, the base salary, pay/step plans, City and State provided medical benefits packages along with other incentive-based compensation programs. To ensure the project's validity and applicability, McCartney Resources conducted a thorough, interactive compensation and benefits analysis using similar-sized municipalities (SC, NC and GA) for comparison and recommended comparator cities for consideration.

➤ **City of Myrtle Beach, Grand Strand Humane Society**

Attn: Fox Simons, Assistant City Manager
P.O. Drawer 2468
Myrtle Beach, SC 29578-2468

www.CityofMyrtleBeach.com
fsimons@cityofmyrtlebeach.com
(843) 918-1016 Direct Line

Overview: Project completed! An entity receiving substantial financial support from the City of Myrtle Beach, McCartney Resources completed a contract assessing and recommending competitive changes to operational functions (e.g., organizational structure, position description development, compensation review and survey (selected positions), review and recommendations for Standard Operating Procedures, etc.) to include financial stability of the organization as well as an assessment on the effectiveness of the Board of Directors.

➤ **Girl Scouts of South Carolina – Mountains to Midlands**

Attn: Lynn Arve, Chief Business Officer
Five Independence Pointe, Suite 120
Greenville, SC 29615

(governance regulated)

www.GSSC-MM.org
larve@gssc-mm.org
(864) 423-3075 Cell

Overview: **Projects completed!** Retained contract with multiple responsibilities to include compensation management, annual benefits' analysis and a complete council reorganization to better support operations and talent management with a focus on retention and growth. An intragyrat part of operations management and Human Resources compliance and processes, supporting critical efforts to enhance a solid, competitive HR infrastructure.

➤ **Town of Ravenel**

Attn: Mike Hammer, Town/Planning & Zoning Manager
5962 Highway 165, #100
Ravenel, SC 29470

**Design & Implementation of HR Infrastructure
(w/ Comp Study)**

www.TownofRavenel.com
townadministrator@townofravenel.com

Overview: Contracted to assist and guide in developing a solid HR infrastructure to include best practices and a compensation study. Assess and recommend changes to operational functions (e.g., organizational structure, position description development, compensation review and survey as well as the full employee life cycle functions with a focus on compliance.

➤ **CaringWorks, Inc.**

Dr. Carol Collard, President & CEO
2785 Lawrenceville Hwy., #205
Decatur, GA 30033

Full HR Support, Strategic Planning & Initiatives

www.CaringWorksInc.org
carolcollard@caringworksinc.org
(404) 371-1230 x210 Direct Line

Overview: Long-term contract engagement designed to assist on-site and as support with all functions in Human Resources. Prepare for and guide in employee relations matters, leave requests such as FMLA, personal leave, etc. Develop reference materials for employee full lifecycle to include onboarding, salary comparisons, recruitment, training and development as well as leadership coaching.

Additional references and/or any details of listed references available...

6. YOUR STRATEGIC INVESTMENT – DETAILED COST

Our Uniqueness. We build trust and readiness to accept the need for change throughout an organization, developing consensus and commitment. **We are hands-on and see the project through to completion including implementation and effectiveness of the program.** Building upon our HR industry expertise, as consultants we are uniquely positioned to assist and guide in strengthening your strategic initiatives of your HR function to support the execution of business strategy. We also understand the nature of a municipality and sensitivity of public information.

As your strategic HR partner working with the City's leadership team, the pricing model offers a full program designed to develop a solid Wage & Compensation Analysis to better support the City's objectives and strategies. HR Bridging is committed to providing quality cost-effective services with great consideration of your financial means. Note that with our commitment to the study and opportunity to support the City's initiative, **reasonable expenses for on-site meetings are integrated into this cost and not billed separately.**

A Business Strategy Wage & Compensation Analysis	
The Project	Proposed Timeline
<ul style="list-style-type: none">✓ Kick-Off Meeting, Identifying Compensation Goals✓ Objectives with Deliverables<ul style="list-style-type: none">○ Duties Analysis and Job Classifications○ Evaluation of Existing Job Descriptions○ Compensation Study / Marketplace Comparison✓ Classification and Compensation Administration✓ Content of Work / Presentation✓ Other Variables in Study – Additional Steps✓ The Final Documents / Presentation	Two (2) to Three (3) Month Timeframe Ready to begin December 1st
	Total Project Investment \$14,000*

**Consideration given for reduced composite rate to support municipality initiatives, previous development of survey and supporting worksheets as well as directly related [recent] experience. Utilizing these existing tools assist in a cost-effective program.*

Thank you again for your time and consideration. We look forward to the opportunity to support the City of Isle of Palms and strategic HR efforts.

Regards,



Nancy A. McCartney, MBA, PHR, SHRM-CP
President and CEO
Nancy@HRBridging.com
Cell: (864) 230-7744

Work Product – Examples Attached

- Municipality Data Tracking Worksheet (Excel format)
- Pay Grades / Ranges with Strategic Timeline for Implementation
- Executive Summary

**Examples are just a few of the work product provided.*

[illegible]

[illegible]

Data Collection

Serving as valuable resources in analyzing data collected, the following means were used in collecting competitive compensation and benefits' information as well as insight into marketplace demographics and trends supporting recommendations for competitive strategies.

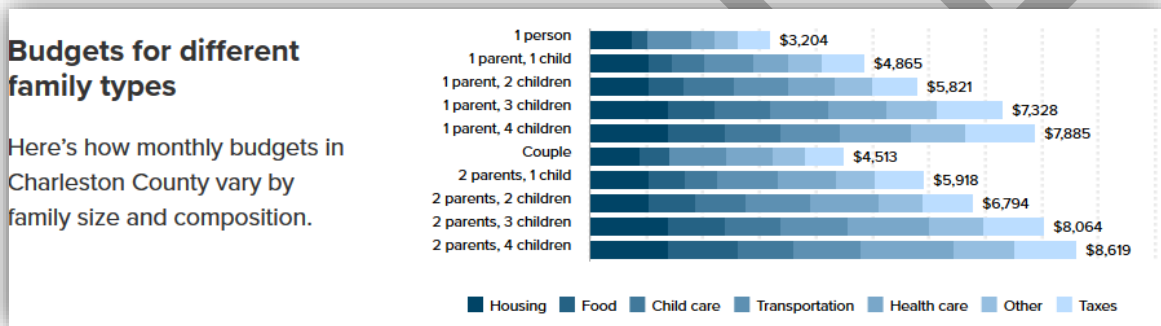
- **Employee Survey** – Gathered employee feedback and input on a variety of employment-related topics to include:
 - Job Duties (Description)
 - Compensation
 - Benefits
 - Work-Life Balance & Wellness Initiatives
 - Performance Management
 - Career Development & Recognition
- **Comparable Municipalities** – Gathered comprehensive pay practice and salary data with benefits' information relative to respective departments as follows:
 - Administrative – Goose Creek, Hanahan, Isle of Palms, Tybee Island and Wrightsville Beach
 - Public Safety – City of Charleston (Officers), Goose Creek, Hanahan, Isle of Palms, North Charleston, Summerville
 - Public Works & Utilities – Goose Creek, Hanahan, Isle of Palms, North Charleston, Southern Shores, Summerville, Tybee Island and Wrightsville Beach
- **Area Economic Information/Impact**
 - Review of Estimated Resident & Visitor Impact
 - Folly Beach – Reported Visitor Trips, Day and Overnight Estimations
 - Folly Beach & Charleston Area Forecasting Index
- **South Carolina Municipal Association** – Provides services, programs and tools [information] offering knowledge, experience and resources for efficient and effective operations.
 - Annual Compensation Reports
 - Community/Economic Development Information
- **Department of Labor, Bureau of Labor Statistics** – Principal fact-finding agency for the U.S. government in the board field of labor economics and statistics.
 - Demographics with Labor Force Statistics
 - Consumer Price Index
 - Southeast Information Office, Charleston [Area]

With compensation and benefits becoming more important to a Total Reward strategy in recruiting and retaining employees, an overview of job descriptions, wage structure, pay practices, base pay increases and other relatable variable and non-variable data has been included in the study. Additionally, comparison of benefit plan designs, premium cost, cost-sharing arrangements, retirement plans, time off and flexible schedules plus other trending workplace cultural offerings are included.

Executive Summary | Community Overview

In benchmarking and evaluating employee compensation and benefits as a Total Reward package, it's critically important to understand and analyze demographics along with cost of living comparable to the City and surrounding communities. Cost of living, the amount of money needed to sustain a certain standard of living by affording expenses such as housing, food, taxes and healthcare, compares employee compensation and the level of standards.

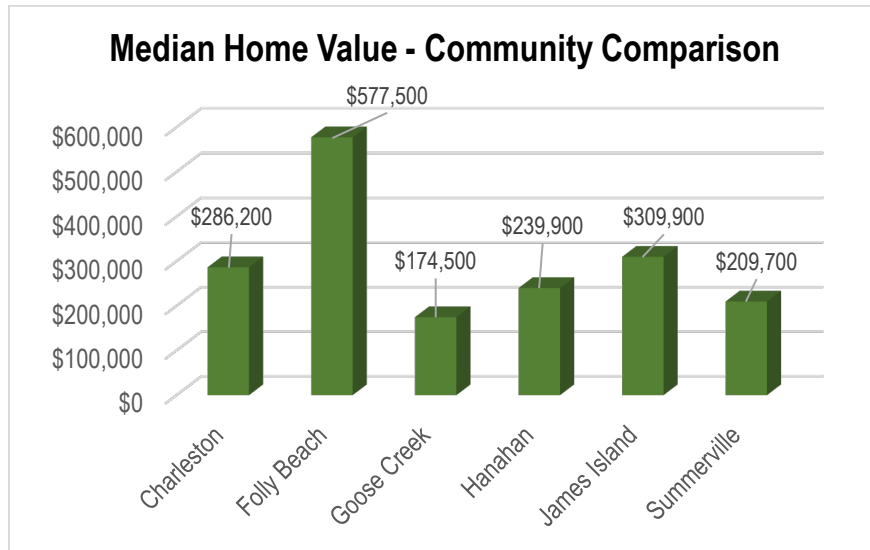
Combined with evaluating and comparing competitor compensation and benefits' practices, according to the Economic Policy Institute (epi.com) among the 46 counties in South Carolina, Charleston County is the 2nd highest with a median family income being the 1st highest which ranks the county 44th amongst all counties on the pay scale for compensating according to the standards of living. Basically, for a two-parent, two-child family to live in Charleston County, the estimated cost is \$6,794 per month (\$81,523 per year) to secure a modest yet adequate standard of living.



Charleston County School District serves as the public-school system for Folly Beach with students attending James Island Elementary, Middle and High Schools.

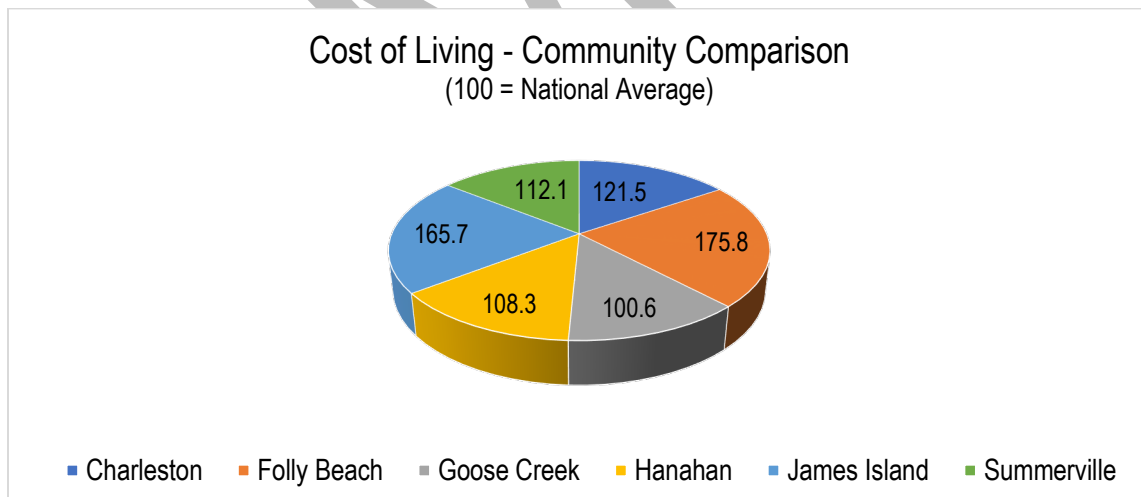
It is estimated by Charleston Regional Development Alliance that the local area unemployment rate will drop again this year from 2.8% to 2.6% in year 2020.

In 2018, *Charleston Today* listed Folly Beach in their top 10 of “best tourist attractions” in the area. This is aligned with economic studies of Charleston and surrounding areas estimating an 11% growth rate to include the City of Folly Beach.



Various data components of living costs are based on measures known as Regional Price Parities (RPP). RPP tracks different price levels of categories such as food, transportation, housing and education as compared to the national level which is set at 100.

According to the Bureau of Labor Statistics, housing ranges between 30-42% of the average household budget (city dwellers are around 40%). This is used as part of the cost of living calculation when determining income for means to live at a standard level.



Overall, data collected provides information for fact-based decision making in core areas of employee compensation and benefits (the Total Rewards package) while remaining competitive and strategic with retaining and recruiting top talent.

- ✓ Annual Merit (traditional), often tied to annual performance evaluations and those recognized for increasing knowledge through certifications.

c) Rethink Pay for Performance and Include Career Progressions

- ✓ Succession Planning (to delegate is to develop).
- ✓ Expanding on employee responsibilities (in the form of contributions), consider staffing levels and/or special committees that contribute to decision-making.
- ✓ Recognizing those that contribute to developing community programs positively impacting City revenue (saving or increasing dollars).

Next – Expand the View as an Employee Total Reward Program (elements that enhance the employee experience) with consideration of the following:

Low to No Cost – Offering Value Added Benefits (some at no cost and/or offer savings for the City to reallocate dollars)

- ✓ Provide Annual Benefits Statements for Each Employee
- ✓ Develop a Longevity Rewards or Recognition Program (see suggestions below)

Years of Service	Recognition / Award	Notes
5 th Year	\$500	+ \$50 restaurant gift card
10 th Year	\$1,000	+ \$75 restaurant gift card & movie tickets
15 th Year	\$1,500	+ concert tickets for theatre
20 th Year	\$2,000	+ 2-night hotel stay
25 th Year	\$2,500	+ restaurant gift card & 2-night hotel stay
30 th Year	\$3,000	+ travel package

- ✓ Offer Short-Term Disability Program (with employees paying premium cost)
- ✓ Reinstate or expand the employee gym membership (with a cap on total monthly award)

Higher Cost – Offering Benefit Enhancements

- ✓ Most importantly is employee compensation that falls below marketplace value as identified in the worksheets. It is recommended that consideration be given to developing a 3- to 5-year plan for adjustments and implementation of a program going forward to better position the City for recruitment and retention.
- ✓ Consider allocating savings from reducing dependent premium coverage to compensation adjustments (developing a strategic 3- to 5-year plan; see Grades spreadsheet for detailed recommendations). This would directly support compensation changes as well.
- ✓ Additional Paid Holiday(s) – competitors average an additional one (1) to two (2) offered
- ✓ Additional Sick Leave Time.
- ✓ Car Allowance and/or Carpooling Program (e.g., if two employees ride together an average of 60% of their monthly commute, each receives \$50 – concept is they save money carpooling and it's a 'reward' initiative).
- ✓ Consider expanding housing stipend program and/or a housing program that provides employees with a one-time payment/bonus towards the purchase of a home AND/OR consider expanding to include those living on James Island (utilizing dollars as they come available under the current program, grandfathering current recipients).



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now, for tomorrow.

City of Isle of Palms, South Carolina
Proposal to provide a wage & compensation analysis

November 6, 2020

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1. Cover page

a. Company name and address

Baker Tilly US, LLP

b. Contact person(s)

Ann Antonsen, Director
Project Director

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Kathleen Aho, Principal
Authorized Representative

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Email: kathy.aho@bakertilly.com

c. Location of office

Baker Tilly has more than 50 locations throughout the country. The proposed project director is based out of St. Paul, Minnesota (52 employees), but will receive assistance from professionals in Virginia, Florida and Texas.

Primary location

380 Jackson Street, Suite 300
St. Paul, MN 55101

d. Date of proposal

November 6, 2020

2. Transmittal letter

November 6, 2020

Ms. Desirée Fragoso
City Administrator
City of Isle of Palms
1207 Palm Boulevard
Post Office Box 508
Isle of Palms, South Carolina 29451

Dear Ms. Fragoso:

In accordance with the City of Isle of Palms' (the "City") request for proposals, Baker Tilly US, LLP (Baker Tilly) is pleased to submit our qualifications to conduct a wage & compensation analysis to evaluate the City's wage and compensation structure and recommend updates to the job classification and total compensation system.

Our firm has assisted numerous jurisdictions throughout the United States in addressing human resources and compensation issues, as well as performing specialized management studies. We have created an extensive consulting service that provides in-depth study and analysis on a variety of management topics. In addition, Baker Tilly ensures that we have the staff, capabilities and experience required for the study the City has outlined.

Baker Tilly has developed specialized expertise in performing personnel and compensation studies and currently serves as the ongoing position classification consultant for several cities throughout South Carolina, the Midwest region and the country. We feel that this experience, coupled with our technical and human resources specialties, will bring extensive expertise to your study in the areas of human resources administration.

Our understanding of Isle of Palms' needs

Isle of Palms is seeking proposals from qualified companies to evaluate the City's wage and compensation structure and recommend updates to the job classification and total compensation system. Baker Tilly will conduct a comprehensive classification and compensation study and analysis for the City's approximately 39 positions. Baker Tilly will assist the City in the review and analysis of the current job classification and compensation system, conducting a comprehensive market survey, evaluating internal equity and recommendations for improvements to the existing system or development of a new system which meets the goals established by the City of Isle of Palms. The proposed system will be understandable and explainable to administration, elected officials, employees and citizens and can be maintained by the City. The system will allow the City of Isle of Palms to recruit and retain quality, qualified employees and will be competitive with comparable organizations. The system Baker Tilly will develop will:

- Establish fair and equitable compensation relationships between positions within the City
- Reflect relevant market conditions outside the organization
- Apply to all City positions professionally, consistently and objectively
- Include employee input and participation as an integral part of the study process
- Provide a strategic plan for implementation and ongoing maintenance in accordance with best practices

Why Baker Tilly is ideally suited to serve Isle of Palms

- **Our team has successfully performed hundreds of similar studies nationwide, having been successfully implemented in governments large and small.**

Baker Tilly has been performing compensation and classification studies for more than 30 years. We have successfully implemented hundreds of studies in public organizations across the country. Our focus is on the public sector and our personnel have extensive experience in public sector pay and classification.

- **With us, you do not just get a study, you get a system. We train you in the system and leave you prepared to utilize it, as needed, as your workforce needs evolve.**

Upon completion of the study Isle of Palms will have the necessary tools to manage the classification and compensation system moving forward. As City changes and evolves, the SAFE® system provides the City with a tool to evaluate positions as they change or as they are created.

- **Our SAFE® classification system is solid, tested and is proven as a methodology for fairly and appropriately distinguishing classifications between public employees.**

In today's environment, organization's need to know that their methods are proven and sound. SAFE® gives you a tested methodology that works to properly differentiate between job classes in your organization.

- **We know that quality studies rest on quality data.**

To achieve this goal, we carefully identify benchmark positions for use in the study process and ensure that we collect data on a comparative basis. When the study is completed, we support our work with regression analysis to document your proposed payroll to your benchmarked competition.

Overall, we pride ourselves in doing high-quality work that is defensible, transparent and fair to both the organization and its employees, as we realize that a pay and classification study is critical to your ability to maintain and grow the quality of workforce that you need to perform at the level expected by your citizenry. We proudly stand by our work and will defend and support it through adoption.

Included in this proposal are the qualifications of our firm, a detailed scope of services, our study methodology and a list of client references. The project's time frame is also provided, along with the resumes of the consulting team.

This proposal is valid for 120 days after the proposal due date.

Very truly yours,

BAKER TILLY US, LLP



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Principal

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Ann Antonsen

Director

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3. Statement of qualifications

a. Prior experience

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country — and internationally. As a member of Baker Tilly International, the world's 10th largest accountancy and business advisory network, we are able to extend our reach through trusted relationships with firms located across the country and throughout the world.

Baker Tilly was founded in 1931 with one central objective: to use our industry specialization to help our clients improve their businesses. For more than 85 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with Isle of Palms as we seek to become your Valued Business Advisor.

Key facts about Baker Tilly:

- Headquartered in Chicago and employing more than 1,400 throughout the Midwest
- Provides a wide range of accounting, tax, assurance and consulting services by more than 4,000 total staff members, including 375 partners
- Ranked among the 15 largest accounting firms in the U.S.
- Serving clients with industry-focused teams

Baker Tilly has provided high quality, independent financial and management advisory services to public and not-for-profit organizations for more than 60 years. Baker Tilly's staff has been advising their clients in organizational development for more than 30 years. Baker Tilly's human capital practice group is comprised of a knowledgeable, experienced staff with direct experience in managing and leading local city and county governments. Our team of professionals brings practical, realistic and creative solutions to the challenges faced by public entities.

Our compensation consulting team is focused on position classification, compensation and performance evaluation. Our work is competitive, current, court tested and copyrighted to deliver pragmatic outcomes. Our organizational management focus ranges from human resource consulting, executive recruitment, group facilitation, strategic planning, budget analysis, resource sharing and building collaborations to organizational improvement and efficiency studies.

12th

Largest
accounting and
advisory firm in
the U.S.



50+

Offices



4,000+

Team
members



\$789.6M

FY20 revenue



3. Statement of qualifications

Public entities are under a great amount of pressure to deliver high quality services in a fiscally constrained environment. Traditional methods and means don't necessarily work anymore and this scenario is not likely to change at any time in the future. To that end, elected officials and public administrators are under pressure to employ new and innovative solutions that require progressive leadership, creative collaboration, cautious risk taking and an investment in their personnel and organizational foundation. Success in the public sector is hard to define, but those public entities that enhance and enrich their people, their process and their systems are more likely to deliver more value by maximizing the use of public resources, thus achieving more success in the marketplace of public opinion.

Since our firm's beginning, we have emerged as a leader in human resource management consulting and executive recruitment. It is our 30+ years of consulting experience, coupled with our unique approach and personal touch, which drive our internal standard for delivering only outstanding services and leading-edge products.

There are a number of factors that set Baker Tilly apart from other consulting firms performing studies such as the proposed engagement for the City of Isle of Palms.

Although we have included below a lengthy list of organizations for whom Baker Tilly has provided classification and compensation services, to simplify Isle of Palms' evaluation process, we have augmented this list by including a brief narrative of select experience our staff provides, as well as a generalized list of outcomes consistent to our many custom compensation engagements.

- **Evaluating the appropriateness of (and potentially consolidating) job titles:** The assignment of job titles (including the potential for consolidation where warranted) is an integral part of each comprehensive classification and compensation study that Baker Tilly conducts. Baker Tilly provides a consistent, easy to explain and understand rationale for the assignment of job titles, which would be vital to Isle of Palms' success in this project given the diversity of jobs included in the scope of work.
- **Analyzing extensive total compensation survey data:** Baker Tilly has assigned to the Isle of Palms project a consulting team with diverse public and private sector experience gathering and analyzing survey data. This group has extensive experience in customized classification and compensation studies for numerous organizations.
- **Providing detailed implementation cost estimates:** Although discussed in greater detail below, Baker Tilly has the experience and capability to guide Isle of Palms in the most effective implementation costing scenarios and to prepare highly complex financial models leveraging our staff's Microsoft Excel skillset.
- **Presenting compensation results:** Baker Tilly's staff has broad experience interacting with employees at all levels in our client organizations. From executives primarily in office working environments to individual contributors in the field, we have successfully engaged employees to establish credibility in our methodology and



3. Statement of qualifications

results. Likewise, our staff has a distinct ability to present the results of compensation studies in such a way that elected officials from all walks of life can understand.

Although each engagement is different, the following are the general results Baker Tilly has achieved on behalf of our public sector clients:

- Established fair and equitable relationships among positions throughout various pay structures (internal equity);
- Identified relevant market conditions to strategically select benchmark organizations;
- Included employee input and participation to promote transparency and consistency in the job classification and compensation processes;
- Developed pay structures that reflect the defensible, quantifiable alignment of positions and market competitiveness;
- Maintained compliance with state and federal laws (FLSA, for example); and
- Implemented modified job classification and compensation systems within our client's defined budget parameters.

Following is a partial list of Baker Tilly's previous Human Capital studies.

List of relevant projects: 2015 – present				
Year	Client	State	Project	Population
2015	Amherst	VA	Pay & Class Study	2,219
2015	Appomattox River Water Authority	VA	Comp Study	
2015	Bloomington	MN	SAFE Database	86,319
2015	Bluffton	SC	Class & Comp Study	15,199
2015	Cass Lake	MN	Comp Study	747
2015	Chesapeake Bay Bridge Tunnel Dist Com	VA	Salary Update Study	
2015	Clarkfield	MN	Class & Comp Study	832
2015	Coweta County	GA	Class & Comp Study	133,180
2015	Dinwiddie County	VA	Comp Study	27,904
2015	Emporia	VA	Comp & Class Study	5,588
2015	Franklin County	VA	External Comp Study	56,335
2015	Harris County	GA	Class & Comp Study	32,663
2015	Hutchinson Utilities Commission	MN	Job Eval and Comp Syst	13,871
2015	Independent School District No. 0206	MN	Salary Study	11,580
2015	Kannapolis	NC	Class & Comp Study	44,359
2015	La Crosse Public Library	WI	Class & Comp Study	51,522
2015	Lake Geneva	WI	Comp Study	7,710
2015	Lake Worth	FL	Class & Comp Study	36,000
2015	Le Sueur	MN	Comp Study	4,041
2015	Lee County	NC	External Comp Study	60,266
2015	Lexington	NC	SAFE Training	18,993
2015	Little Falls	MN	Class Study	8,232
2015	Luray	VA	Comp Study	4,860

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2015	Maple Lake	MN	Class & Comp Study	2,093
2015	Maryville	TN	Class & Comp Study	27,992
2015	Midlands Auth for Conv, Sports & Tourism	SC	Class & Comp Study	
2015	Monroe	NC	Class & Comp Study	33,975
2015	Mukwonago	WI	Comp Study	7,494
2015	New Ulm	MN	Comp Study	13,210
2015	Newnan	GA	Comp & Class Study	34,847
2015	Newport	MN	Class & Comp Study	3,461
2015	NC Assn of County Commissioners	NC	Comp & Class Study	9,944,000
2015	Orange Water and Sewer Authority	NC	Comp Study	140,352
2015	Otsego	MN	Class & Comp Study	14,254
2015	Pine County	MN	Class & Comp Study	29,104
2015	Plymouth	MN	Class Study	73,987
2015	Quin Rivers Inc.	VA	Comp Study	
2015	Red Lake Falls	MN	Comp Study	1,410
2015	Rivanna Water and Sewer Authority	VA	Class & Comp Study	
2015	Rockbridge County	VA	Class, Comp & Perf Eval	22,307
2015	Rockingham County	NC	Class & Comp Study	91,898
2015	Rowan County	NC	Comp Plan Study	138,323
2015	Scott County Community Development Agency	MN	Class & Comp Study	137,232
2015	Sherburne County	MN	Class & Comp Study	90,158
2015	Shorewood School District	WI	Comp Study	13,337
2015	Siler City	NC	Class & Comp Study	8,169
2015	South Boston	VA	Comp Study	7,989
2015	Southampton County	VA	Class & Comp Study	18,128
2015	Warrenton	VA	Class & Comp Study	9,862
2015	Washington Housing Auth & Mid-East Reg. Housing Auth	NC	Class & Comp Study	
2015	Whitewater	WI	Class & Comp Study	14,732
2015	Wilson	NC	Comp Study	49,628
2015	Wythe County	VA	Class & Comp Study	29,344
2016	Altavista	VA	Class & Comp Study	3,490
2016	Ankeny	IA	Class & Comp Study	51,567
2016	Belle Plaine	MN	Comp Plan	6,838
2016	Bertie County	NC	Comp Study	20,344
2016	Blacksburg	VA	Comp Study	43,609
2016	Branson	MO	Class & Comp Study	11,064
2016	Cabarrus County	NC	Comp Study	187,226
2016	Cannon Falls	MN	Class & Comp Study	4,078
2016	Chapel Hill	NC	Class & Comp Study	59,635
2016	Cleveland County Water	NC	Pay & Class Study	97,047

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2016	Cologne	MN	Comp Study	1,564
2016	Crosslake	MN	Class & Comp Study	2,193
2016	Dallas Area Rapid Transit Authority	TX	Comp Services	1,318,000
2016	Daniel Boone Regional Library	MO	Class & Comp Study	
2016	Dare County	NC	Class & Comp Study	35,019
2016	Eagan	MN	Class & Comp Study	65,453
2016	Eastern Shore of Virginia 911 Commission	VA	Comp Update	
2016	El Paso	TX	Class & Comp Study	674,433
2016	Gastonia	NC	Class & Comp Study	73,209
2016	Grant County	MN	Class & Comp Study	5,989
2016	Greenville Housing Authority	NC	Class & Comp Study	89,130
2016	Hibbing Housing and Redevelopment Authority	MN	Class & Comp Study	16,301
2016	Hoboken Housing Authority	NJ	Comp Study	52,575
2016	Independent School District No. 0206	MN	SAFE System	11,580
2016	Kenosha Joint Services	WI	Wage & Comp Study	99,889
2016	Lake Zurich	IL	Class & Comp Study	19,984
2016	Lawrence Public Library	KS	SAFE Database	
2016	League of Wisconsin Municipalities	WI	Market Survey	5,779,000
2016	Louisa County Public Schools	VA	Comp Study	33,945
2016	Manassas	VA	Class & Comp Consult	41,705
2016	Moorhead Public Housing Agency	MN	Salary Study	39,398
2016	Newport News Redevelopment & Housing Authority	VA	Comp Study	182,385
2016	Nisswa	MN	Class & Comp Study	2,004
2016	Port of Corpus Christi Authority	TX	Comp & Ben Struc	316,381
2016	Rappahannock Juvenile Facility	VA	Class & Comp Study	
2016	Richmond Behavioral Health Authority	VA	Comp Update	
2016	Richmond Heights	MO	Comp & Class Study	8,508
2016	Roanoke Valley Juvenile Detention Center	VA	Salary Study	
2016	Selma	NC	Class & Comp Update	6,237
2016	Shenandoah County	VA	Salary Survey	42,684
2016	Spring Hill	TN	Class & Comp Study	32,576
2016	St. Charles City-County Library District	MO	Comp & Benes Analysis	
2016	St. Cloud Housing and Redevelopment Authority	MN	Comp Study	66,297
2016	Stevens Point	WI	Comp Study	26,670
2016	Stevens Point Area Public School District	WI	Comp Study	26,670
2016	Sumter County	FL	Comp Study	105,056
2016	Washington County Community Development Agency	MN	Class & Comp Update	251,597
2016	Willmar	MN	Comp Study	19,680
2016	Wilmington	NC	Comp Practices and Market Pay Study	112,067
2016	Winston Salem	NC	Class & Comp Study	236,441

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2017	Aitkin	MN	Class & Comp Study	2,087
2017	Appalachian Regional Library	NC	Class & Comp	
2017	Association County Commissioners of Georgia	GA	Class & Comp	10,100,000
2017	Bath County Public Schools	VA	Pay & Class	
2017	Baudette	MN	Market Survey	1,073
2017	Baxter	MN	Comp Study	7,781
2017	Cabarrus County	NC	Class & Comp Study	187,226
2017	Cabarrus Health Alliance	NC	Comp Benefit Study	
2017	Caroline County	VA	Pay & Class Study	29,298
2017	Chapel Hill	NC	Comp Study & FLSA Rev	59,635
2017	Chincoteague	VA	Comp Study	2,929
2017	Cleveland County	NC	Comp & Benes Study	97,047
2017	Craven County	NC	Comp Study	103,451
2017	Dunn County	WI	Market Survey	44,122
2017	Florida Municipal Power Agency	FL	Comp Study	
2017	Fort Wayne City Utilities	IN	Class and Comp	
2017	Harnett County	NC	Comp Study	124,987
2017	Harrisburg	PA	Class & Comp Study	49,188
2017	Hopewell	VA	Class & Comp Consult	22,163
2017	Independent School District No. 0013	MN	Job Desc/Pointing Agree	19,674
2017	Le Sueur County	MN	Market Survey	27,810
2017	Lee's Summit	MO	Comp & Benefit Study	93,184
2017	Lufkin	TX	Comp Study	36,085
2017	Meeker McLeod Sibley Community Health Services	MN	Class & Comp Study	
2017	Mendota Heights	MN	Class & Comp Study	11,222
2017	Middlesex County	VA	Comp & Class Study	10,762
2017	New Brighton	MN	Market Survey	21,867
2017	New Hope	MN	Market Survey	20,877
2017	North Mankato	MN	Anal of Comp Syst Structure	13,439
2017	Osseo	MN	Class & Comp Study	2,476
2017	Person County	NC	Phase II Implementation	39,276
2017	Pine Island	MN	Class & Comp Study	3,318
2017	Piqua	OH	Comp Study	20,906
2017	Pleasant Hill	IA	Class & Comp Study	9,082
2017	Polk County	MN	Market Survey	31,569
2017	Pulaski	VA	Class & Comp Plan	8,948
2017	RC Hospital and Clinics	MN	Class & Comp Study	
2017	Richland	WA	Class & Comp Study	53,019
2017	Roanoke County	VA	Benefits Survey	93,524
2017	Robbinsdale	MN	Comp Study	14,302

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2017	Saginaw County	MI	Class & Comp	195,012
2017	Salem	VA	Class & Comp	25,483
2017	Sammamish	WA	Class & Comp Study	50,169
2017	Santa Fe	NM	Class & Comp Study	83,875
2017	Shelby	NC	Class & Comp Study	20,325
2017	Stacy	MN	Comp Plan	1,426
2017	Story County	IA	Class & Comp Study	92,406
2017	Topeka and Shawnee County Public Library	KS	Comp Study	
2017	Upper Trinity Regional Water District	TX	Comp & Class Study	
2017	Vienna	VA	Class & Comp Study	16,370
2017	Watauga County	NC	Class & Comp Study	52,372
2017	West Point Public Schools	VA	Class & Comp Study	
2017	Wyoming	MN	Market Survey	7,750
2017	Yellow Medicine County	MN	Market Survey	9,875
2018	Battle Creek	MI	Comp Study	51,833
2018	Bemidji	MN	Comp Study	14,435
2018	Blue Springs	MO	Pay Plan Design	53,294
2018	Bonner Springs	KS	Comp and Class Study	7,665
2018	Broad River Water Authority	NC	Class and Comp Study	
2018	Burnsville	MN	Class and Comp Study	61,290
2018	Carver	MN	Comp Study	4,628
2018	Cleveland County	NC	SAFE Database	97,047
2018	Cloquet	MN	Comp Plan Update	12,050
2018	Craven County Schools	NC	Comp Study	
2018	Dallas Area Rapid Transit Authority	TX	Comp Study	
2018	Dayton	VA	Class and Comp Study	1,609
2018	DeSoto	TX	Class and Comp Study	52,599
2018	Dinwiddie County Schools	VA	Review of Compensation Study	
2018	Elko New Market	MN	Pay Equity Report	4,513
2018	Eudora	KS	Class and Comp Study	6,211
2018	Grain Valley	MO	Class, Comp & Benes Study	13,125
2018	Harris County Housing Authority	TX	Salary/Wage Comparability Study	
2018	Housing Authority of the Durham	NC	Salary Comparability Study	263,016
2018	Ingleside	TX	Class & Comp Study	10,488
2018	Intermediate School District No. 917	MN	Job Description Updates/Training	
2018	Johnson County	IA	Comp and Class Study	144,251
2018	Lakeville	MN	Class & Comp Study	58,562
2018	Laurinburg	NC	Class & Comp Study	15,774
2018	Leavenworth	KS	Comp Study	35,891
2018	Mansfield	CT	Class & Comp Study	25,959

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2018	Minnehaha Creek Watershed District	MN	Class and Comp Study	
2018	Minnehaha Creek Watershed District	MN	Pay Equity Report	1,124,000
2018	Minnetonka	MN	Class & Comp Study	51,638
2018	Northwest Regional Library	NC	Class & Comp Study	
2018	Person County	NC	Phase III C&C Implementation services	39,276
2018	Rappahannock Regional Jail	VA	Comp Study	
2018	Scott County Community Development Agency	MN	Pay Equity Report	137,232
2018	Thibodaux	LA	Market Study	14,566
2018	Verona	WI	Market Survey	10,632
2018	Wabasha Soil and Water Conservation District	MN	Class Study	
2018	Willmar	MN	Comp Study	19,680
2018	Winston Salem	NC	Class & Comp Study-Phase II	236,441
2018	Wright Soil & Water Conservation District	MN	Class and Comp Study	
2019	Adams County	WI	Class & Comp Study	19,973
2019	AppalCART	NC	Class & Comp Study	
2019	Bellingham	WA	Comp Market Study	89,045
2019	Brooklyn Center	MN	Comp Study	30,712
2019	Capital Region Water	PA	Class & Comp Study	
2019	Circle Pines	MN	Comp & Class Study	4,978
2019	Council Bluffs	IA	Class & Comp Study	62,316
2019	Dallas Housing Authority	TX	Comp Study	
2019	Fillmore Soil & Water Conservation District	MN	Class & Comp Study	
2019	Gastonia	NC	Class & Comp Study	75,536
2019	Gatesville	TX	Class & Comp Study	12,387
2019	Independent School District No. 2769	MN	Job Desc/Pay Equity Review	
2019	Intermediate District 0287	MN	Pay and Class	
2019	Iowa League of Cities, Des Moines	IA	Comp Study	3,146,000
2019	King County Housing Authority	WA	HR Management Consulting	
2019	Local Government Information Systems	MN	Comp & Benefit Study	
2019	McFarland	WI	Market Survey	
2019	Montgomery	MN	Class & Comp Study	2,907
2019	Morehead City	NC	Class & Comp Study - Maintenance	9,203
2019	North Central Regional Library	WA	Comp & Benefits Study	
2019	Pottawattamie County	IA	Class & Comp Study	93,386
2019	Payson	AZ	Class & Comp Study	15,476
2019	Pittsylvania County	VA	Comp Study	62,426
2019	River Falls	WI	Class & Comp Study	15,510
2019	Rocky Mount	VA	Comp Study	4,798
2019	Saginaw County	MI	Class & Comp Phase II	195,012
2019	Saginaw County	MI	Class & Comp Phase III	195,012

3. Statement of qualifications

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2019	Salem	VA	Class & Comp	25,483
2019	Sartell	MN	Class & Comp Study	13,917
2019	Scandia	MN	Class & Comp Study	4,120
2019	St. Charles City-County Library District	MO	Market Study	
2019	Stutsman County	ND	Comp Study	
2019	Tyler	TX	Class & Comp Study	104,991
2019	Wheaton	IL	Market Survey	53,373
2019	Wright County	MN	Class & Comp Study	131,311
2019	Zimmerman	MN	Comp Study	5,499
2020	Rappahannock County	VA	Comp & Class Study	7,321
Current	Amelia County	VA	Class & Comp Study	13,145
Current	Crystal	MN	Comp Study	22,463
Current	Elko New Market	MN	Pay Plan Update	4,760
Current	Fertile	MN	Class & Comp Study	833
Current	Fosston	MN	Class & Comp Study	1,481
Current	Horicon	WI	Class & Comp Study	3,595
Current	Independent School District No. 0625	MN	Principal Wage Study	
Current	Moorhead Public Housing Agency	MN	Pay & Classification	
Current	Onalaska	WI	Class & Comp Study	18,712
Current	Otsego	MN	Comp Study	17,357
Current	Richmond	IN	Comp Study	35,353
Current	Traverse County	MN	Class & Comp Study	3,308
Current	Waite Park	MN	Comp Study	7,718
Current	Windsor	VA	Class & Comp Study	2,626

b. Overview of approach

Isle of Palms is seeking the assistance of a qualified consultant or firm to conduct a classification and compensation study and provide recommendations to ensure that the City remains competitive in the marketplace and can continue to attract and retain a talented workforce at market rates. This includes an overall evaluation of the City's current pay structure, actual salaries and benefits compared with that of other relevant competitors; a detailed analysis of the City's compensation structure and recommendations for implementing proposed changes.

Baker Tilly's methodologies are consistent with these goals, as we base our studies on the following guiding principles:

- Classification and compensation studies should include employee involvement and promote transparency to ensure that, at the commencement of the project, ambassadors are created who will build confidence in the process at all levels in the organization

3. Statement of qualifications

- As classification and compensation systems are a key aspect of many other human resources (HR) programs, they must be strategically structured to achieve the stated compensation philosophy and greater operational goals
- Position classification should be a defensible process, the assignment of positions into pay grades should be based on a quantifiable system of job evaluation
- Compensation surveys should include relevant benchmark organizations. Who does the City compete with for talent? Are the demographic characteristics similar? Is there consistency in the services provided? What is the appropriate competitive position?

Adhering to these principles will ensure the proposed compensation study meets its stated goals and best practices, is objective and has the most support during and after implementation.

To facilitate an effective comparison between Baker Tilly's proposal and that of other respondents, we have outlined below key project phases, inclusive of deliverables. Please note that this reflects multiple options for your consideration. Should our subsequent timeline or fee structure exceed those of other consultancies, we'd be pleased to discuss both if identified as a semi-finalist/finalist for your procurement.

1. Project initiation – data collection

- a. Kick-off materials and presentation
- b. Project schedule
- c. Initial data request and review
- d. Meetings with project team and department heads

2. Employee communication sessions

- a. Position Analysis Questionnaire (PAQ)
- b. Employee presentations

3. Job classification/development of job evaluation system

- a. SAFE® job evaluation
- b. Classification recommendations and corresponding employee allocation

4. Total compensation survey and update/development of pay plan

- a. Salary range comparisons using a customized survey and reputable, industry-standard sources of published survey data
- b. Job summaries and salary survey
- c. Market comparisons
- d. Preliminary and final pay plan(s)

5. Implementation strategy and staff training

- a. Implementation costing scenarios (up to three)
- b. Staff training
- c. Administrative guidelines
- d. SAFE® job evaluation scoresheet for ongoing administration

6. Final report

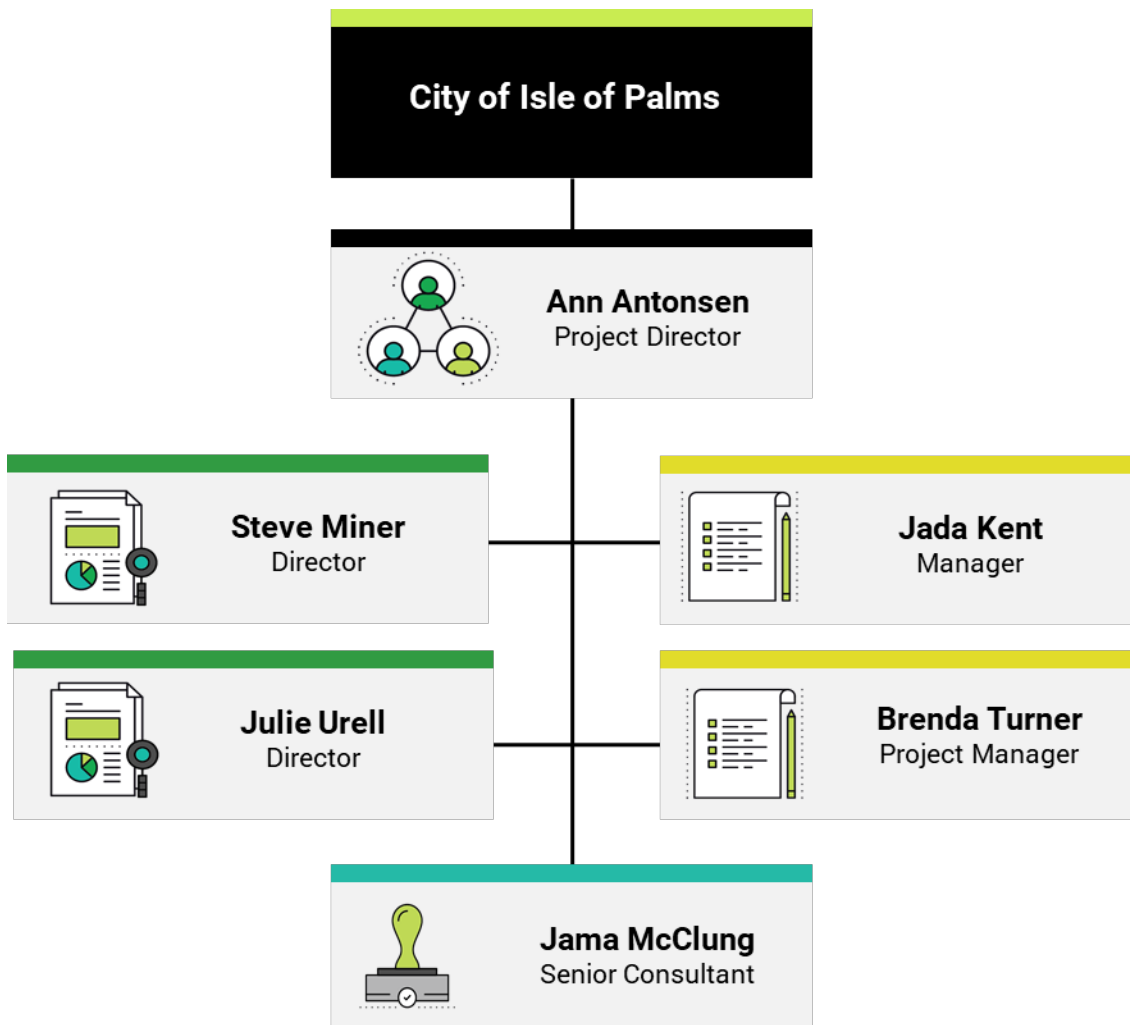
- a. Draft and final reports
- b. Concluding presentation

c. Ability to provide expertise and experience

The Baker Tilly project team is designed specifically for the City of Isle of Palms.




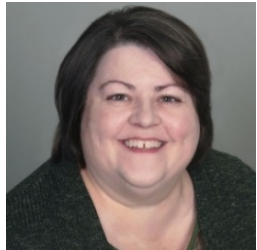
This project team represents experienced professionals who will be working on this project. Our service team is selected to meet four very specific objectives for the City: 1) It represents the staff who will be directly responsible for your projects; 2) It provides a range of expertise to cover the range of service requirements; 3) It provides a national perspective of experience and institutional knowledge to achieve your future objectives; and 4) It represents the commitment to take personal and professional responsibility for the services and outcomes for the City.

Organizational chart



3. Statement of qualifications

Project team bios

Director	Ann Antonsen
	Qualifications: Ann is a consultant with a strong background in organizational management and human resources that she uses effectively in developing position analyses, classification and compensation studies, performance management and evaluation system development and staff training and in conducting executive search efforts for the public sector. She also specializes in performing organizational studies, revising and developing personnel policies and manuals and in conducting organizational management training sessions and providing general human resources assistance. Ann has been with the firm since 2005 and earned a Bachelor of Arts in Psychology from the University of Minnesota.
Manager	Jada Kent, CCP
	Qualifications: Jada is a manager with a background in public sector human capital consulting, including classification & compensation, organization management, and executive recruitment over the last 5 years with Baker Tilly. Jada has earned a master's degree in Public Administration (MPA), a Certified Compensation Professional (CCP) designation from WorldatWork, and is a member of the North Texas Compensation Association (NTCA).
Project Manager	Brenda Turner, CCP
	Qualifications: Brenda is a human capital senior associate with a background serving in compensation and human resources. Prior to joining Baker Tilly, Brenda served most recently as the senior director of global compensation for a global technology company. She has also served in varying compensation, finance and accounting roles in the hospitality, travel and technology industries. Brenda is a Certified Compensation Professional (CCP) through World at Work and is also a member of the Society for Human Resources Development (SHRM). She earned a Master of Business Administration from the University of Texas and joined Baker Tilly in February of 2020.
Senior Consultant	Jama McClung
	Qualifications: Jama joined the executive recruitment team supporting Mid-Atlantic executive recruitment work in 2010. Now her specialty focus is classification and compensation studies, performance evaluations and benefits review. Jama has performed prior consulting support work as a capital project assistant for healthcare IT financial system conversions and IT infrastructure upgrades and has served as a public finance assistant, supporting senior living and healthcare public finance bankers. She attended Glenville State College and is currently completing coursework toward a bachelor's degree in Business Administration.

Full Project Team Resumes can be found in [Appendix II](#).

Remote work



For Baker Tilly, the safety of our people is paramount. We are committed to playing our part in containing COVID-19 by practicing responsible social distancing. As of this writing, our firm is directing all professionals work remotely. Because the City of Isle of Palms expects and deserves tailored, personalized service, we recognize that this policy may cause concern. **Please understand that we are prepared to deliver an exceptional service experience remotely if necessary.**

The City's engagement team has various tools enabling them to assist you from any location. Baker Tilly professionals each receive their own laptop and remote access credentials to connect to our internal network from outside the office. When Baker Tilly and the City are not able to meet in person, we have web conferencing software – including Zoom, WebEx and Microsoft Teams – to quickly set up online meetings.

Additionally, we use Huddle, a secure cloud collaboration software, to work together anywhere, anytime and on any device. Huddle provides a platform for the City and Baker Tilly to come together, share files, assign tasks, and track activity in a secure environment. Using Huddle as a central hub of activity means we all spend less time organizing documents, chasing approvals and searching through email – and more time achieving tangible results. The platform also enables real-time communication, meaning the status of your engagement will always be available. We also recently began using Microsoft Teams, which facilitates easier communication and project management.

4. Project plan

Baker Tilly is uniquely positioned to assist the City of Isle of Palms to ensure an equitable, competitive classification/compensation system is in place that supports its mission of competent, expeditious, courteous and cost-effective services.

a. Statement of methods and procedures

Baker Tilly would value the opportunity to assist the City of Isle of Palms with its classification and compensation study. Our experience working with other comparable government entities in South Carolina and throughout the Country gives us a thorough understanding of the scope of the study that the City is seeking.

The services to be provided by Baker Tilly include:

- Meetings conducted with administration, department heads and other relevant staff to gain an understanding of the needs and expectations of the City and to collect information on the City and department structure, operations and staffing
- Conduct employee orientation meetings; employees and supervisors complete Position Analysis Questionnaires (PAQs)
- Analyze and develop/update job descriptions
- Evaluate positions to determine internal comparability of City positions
- Determine FLSA status of City positions
- Develop and conduct a comprehensive salary and benefits survey of comparable organizations selected in conjunction with the City. Survey information is requested directly from the selected participants. Baker Tilly does not rely on published survey information for public sector participants; this information is used to supplement information collected directly from the selected survey participants. We will use a variety of resources to collect relevant private sector information. Summaries of City positions are included in the survey instrument to ensure comparability of positions.
- Provide recommendations for revisions to the City's current compensation plan, including options for implementation based on the City's financial resources that will enable the City to recruit and retain qualified employees, is competitive in the established market, eliminates compression and ensures fair and equitable internal compensation of City positions
- Provide a manual and training of key City employees on maintaining the classification and job evaluation system and the compensation plan, how to place new positions within the classification, evaluation and compensation system and how to ensure the system remains internally equitable and competitive with the City's established market
- Presentation of study findings and final report to the City.

The manner in which we approach a project takes into consideration two key variables: *process credibility* and *outcome credibility*. Process credibility is the realization to all involved, in particular City staff, that the methodology used is credible, reasonable and fair to all concerned. In addition, the information and communication must be transparent, honest and timely. Outcome credibility is the realization that the information and data used to develop the findings and conclusions is comprehensive, complete and applied consistently and appropriately without bias or preference to any particular person, persons or individual agenda. If these two objectives are realized, the recommendations, outcomes and future implementation are based on a strong foundation. This distinction is unique in our business and is a contributing factor to the benefits and strengths of the Baker Tilly team.

In summary, extensive expertise, human capital consulting experience and a collaborative approach positions Baker Tilly as the most logical choice to serve the City of Isle of Palms' needs.

We are confident that you will find our assertions substantiated by the information presented in this proposal and the comments provided by our references. We look forward to a successful and lasting relationship.

As described in this proposal and outlined below, Baker Tilly is an ideal candidate for meeting your needs. Choose Baker Tilly and you will be joining forces with a strategic ally with vast experience in collaboration with clients. We offer the requisite depth of experience, knowledge and skills to effectively meet the City's needs. Isle of Palms will receive a solution tailored to your needs and objectives from our collaborative process.

What we heard you seek	How we will deliver
1. Job descriptions	<ul style="list-style-type: none"> We establish Position Documentation using our Position Analysis Questionnaire (PAQ) New position (class) descriptions which are up to date and professionally prepared Analysis of your positions vis-à-vis Federal standards for overtime
2. Classification structure	<ul style="list-style-type: none"> Assignment of positions to the appropriate classification and alignment of internal relationships
3. Market survey	<ul style="list-style-type: none"> A comprehensive market survey of those organizations with whom you are competing for talent
4. Compensation schedule	<ul style="list-style-type: none"> We develop a pay structure(s) that is competitive, equitable and meets all state and federal requirements for all employees included in the study
5. Compensation philosophy	<ul style="list-style-type: none"> We will assist with the development of a pay philosophy that makes sense – both for taxpayers and the organization.
6. Classification manual	<ul style="list-style-type: none"> You are buying a system, not just a study. We'll train you on our SAFE system and leave you with a manual and the tools to manage the system thereafter
7. Financial impact	<ul style="list-style-type: none"> Options and our recommended path towards implementation that meets both your fiscal and operational goals, coupled with implementation cost for each option

b. Content of work products

Baker Tilly is pleased to submit this proposal to conduct an analysis of the City of Isle of Palms' classification and compensation system. The proposed project approach and study methodology are outlined below. The scope of services, tasks and staffing necessary to successfully complete this project are discussed in subsequent sections of this proposal. The project approach was developed to include employee and management involvement and communication as requested by the City of Isle of Palms. Baker Tilly is willing to adjust any aspect of this study to respond to the City's needs.

Project initiation

The Baker Tilly Project Director will meet with the designated City staff and appropriate officials to establish working relationships and to finalize a comprehensive work plan and timetable. At these meetings we will request that the designated project manager provide us with the background materials necessary to conduct this study, including current job descriptions, classification and compensation documents, a copy of each labor agreement currently in effect, the City's personnel policies, fringe benefit information and other relevant data. This information will be evaluated to determine the status of existing human resource management programs and to identify apparent issues and opportunities. The purpose of the meeting(s) is to:

- Introduce the Project Director and the consulting team
- Discuss the background and experience of Baker Tilly and the consulting team
- Discuss, in detail, the methodology to be used in conducting the study, the role of the consulting team, management and the employees, and the amount and type of employee participation
- Ascertain the major issues the City wants the study to address
- Review the project schedule and determine significant milestones
- Determine the frequency and content of status reports
- Discuss methods of communicating the status of the study to employees

Baker Tilly will also meet individually with department heads to become familiar with department structure and service levels, hiring and retention issues, any concerns with the current compensation plan and any other issues that may need to be addressed during the study

Data collection

Success in a classification and compensation review requires meaningful employee involvement and transparency, employees play a major role in providing the data needed for this study. Therefore, it is imperative that employees receive information about the study and why it is being conducted, be given opportunities for employee involvement throughout the process, learn the expected outcomes, as well as have the opportunity to ask questions and express concerns.

Baker Tilly will conduct employee informational meetings to introduce the study, explain study procedures and answer any questions employees may have about the process. These meetings will be scheduled and conducted to ensure that all employees have the opportunity to attend and so as not to disrupt operations.

Baker Tilly will introduce the Position Analysis Questionnaire (PAQ) at this time. The questionnaire provides an opportunity for each employee to provide input on essential job functions, education, training, certifications, licenses and experience requirements of the position and provide input on the various job factors which apply to their position. Employees will also identify the specific physical requirements and working conditions of their position to assist in the consultant's review for compliance with the Americans with Disabilities Act (ADA). Baker Tilly will spend time at the meeting reviewing the PAQ and responding to employee questions. The information gathered from the PAQs will provide the information to be used to assist in updating the City's job descriptions, during the job evaluation process and to assist in the collection and analysis of wage data from comparable organizations. Baker Tilly will also review each position's designation under the Federal Fair Labor Standards Act (FLSA).

Baker Tilly has developed an innovative and proprietary *online* PAQ. Any employee who is comfortable using a smartphone, tablet or computer will find the online instrument very user-friendly and efficient. Our online PAQ process features dedicated login credentials per employee and supervisor user and a very intuitive user-friendly experience. Our clients appreciate the efficiencies the online PAQ brings to the study process and the environmentally friendly aspect of a paperless approach. All client data is exchanged utilizing a secure, reliable technology platform with the ability to generate PDF reports for each individual PAQ to document responses. The fee for our online process is included in our pricing.

We find most organizations have at least 90% of their workforce positioned to utilize the online PAQ, and its use adds great value and efficiency to our studies. For a small subsection of employees, we can accommodate handwritten hardcopies when necessary.

During the informational meeting(s), we will also explain the supervisors' roles in completing and signing off on the PAQs. The questionnaire is designed to allow supervisors to comment on employee responses without altering employee responses. This allows the consultant to review complete, unedited responses from employees and supervisors. In instances where the employee and supervisor view the position requirements differently, Baker Tilly will conduct job audits (as necessary) to obtain more information. Audits will be scheduled to minimize disruption to City operations. If necessary, meetings can be scheduled at the beginning or end of a shift to facilitate employee attendance.

A sample PAQ is provided in [Appendix I](#).

Market Survey Job evaluation and development of pay plan

In order to determine appropriate salary levels of positions in the workforce and address the issue of comparable compensation, Baker Tilly will conduct an extensive salary and benefits survey to compare City positions with analogous positions in other comparable agencies in the area labor market. By gathering and analyzing information on wages, wage equivalents and benefits, a comparison of total compensation can be reviewed in comparison to the City's established market area. External market comparisons for positions will be based on similar organizational structure, population, geographic location, job responsibilities, scope of authority, financial, socio-economic, growth and other relevant factors. The study team will consult with the City management and designated staff in identifying the appropriate sources of survey data, which will include public and private sector organizations. Baker Tilly will develop the salary survey in conjunction with the City.

It is recommended that potential survey data pertain to organizations comparable to the City, relate to those organizations with which the City is competing for employees and represent the appropriate labor market.

There are different labor markets for positions. Some positions are recruited from the local area, while others are recruited regionally and/or nationally. The consulting team will work closely with the staff in determining the appropriate labor market for positions.

Job evaluation and development of pay plan

While salary survey data will assist the City in establishing its position in the competitive market, job evaluation is the mechanism that ensures that internal relationships are equitable. Baker Tilly has developed and copyrighted a job evaluation system known as *Systematic Analysis and Factor Evaluation* (SAFE®) system. The SAFE® system is a unique job evaluation method designed to measure job factors which apply specifically to local government. This system has been successfully used for many years throughout the country and has been reviewed by the United States District Court in conjunction with an Equal Employment Opportunity (EEO) suit and found acceptable to the Court.

The system rates and ranks jobs based on various skill levels and work factors. The result is an equitable and consistent method of evaluating jobs and relating positions to the compensation plan. The system facilitates proper and equitable comparisons between and among positions and minimizes the appearance of favoritism in evaluating, rating and ranking jobs.

The elements considered in determining the relative value of classifications are:

- Training and ability
- Level of work
- Physical demands
- Independence of actions
- Supervision exercised
- Experience required
- Human relations skills
- Working conditions/hazards
- Impact on end results

This system can be maintained by the City. Baker Tilly provides training to individuals assigned by the City to this task on utilizing the SAFE® system to evaluate newly created positions and re-evaluate revised positions.

Based on the wage and benefits data analysis and the job evaluation system, Baker Tilly will develop a recommended compensation plan. The plan will be developed in accordance with information obtained from the City regarding its pay philosophy as well as goals and objectives established for its compensation program, including the option for a performance based component. In the development of the proposed compensation plan, Baker Tilly will attempt to equal the market rate for all positions and identify any deviations from the market rate in writing in the Final Report prepared for the City. Baker Tilly will review options with the City to address compensation plan structure, the spread for pay ranges, the relationship between ranges and adjustments needed to ensure that the City remains competitive with the labor market.

Development of Isle of Palms' compensation policy

A pay philosophy guides the design of a compensation system and answers key questions regarding pay strategy. It generally takes a comprehensive, long-term focus and explains the compensation program's goals and how the program supports the employer's long-range strategic goals. Without a pay philosophy, compensation decisions tend to be viewed from a short-term tactical standpoint apart from the organization's overall goals.

Market competitiveness and internal equity are among the most important areas addressed in a pay philosophy. An organization's desired market position involves defining the market and identifying where the organization wants to be positioned within that market. Market position should balance what it takes to attract new employees and retain skilled employees (in other words, eliminate higher pay as the reason employees leave the organization) with the organization's financial resources. Internal equity expresses an organization's desire to provide comparable pay to positions with comparable duties and responsibilities.

A pay philosophy should be developed that establishes a compensation program based on individual employee performance as a key feature of the pay philosophy. Therefore, we emphasize references to performance in the pay philosophy discussion. As part of the study, it is recommended that the City consider these concepts in the adoption of a formal pay philosophy:

- Providing fair and equitable rates of pay to employees
- Defining the City's market area
- Developing a system that establishes a "market rate" for each position and states the minimum wage and maximum rates that the City will pay individuals within a position
- Establishing rates of pay that allows the City to compete successfully for new employees within its market area
- Establishing a market position that is fiscally responsible with public resources
- Ensuring that pay rates for existing employees are based on individual performance that meets or exceeds expectations and reflects changing economic conditions
- Developing a compensation system that allows employees to progress through the pay range as long as their performance consistently meets expectations
- Developing pay administration policies and procedures that ensure their consistent application between departments
- Ensuring that the compensation program is understandable to employees, supervisors, managers, the City officials and the public

Employee communications

Baker Tilly will develop a communications strategy to inform employees of job evaluation and pay grade assignments. Employee communications will be developed explaining the study methodology, employee input opportunities, study recommendations and the process used for reviewing requests for reconsideration by employees who do not agree with the assigned classification. The consultant will participate in the review of employee requests for reconsideration.

Implementation strategy

At the conclusion of the study, Baker Tilly will work with the staff in developing a plan for implementing the study recommendations. The plan will coincide with the needs of the City and the employees while maintaining the City's financial integrity. An estimate of the cost of implementation will be provided.

Staff training

At the conclusion of the study, Baker Tilly will train members of the staff in the methodology used to develop, maintain and update all aspects of the classification and compensation plan and how to determine the validity of requests for reclassification. The training program will include the rating, ranking and salary grade assignments of positions. Instruction manuals pertaining to the job evaluation system will be prepared and presented. The Baker Tilly team will remain available to the staff for additional consultation after the study has been completed.

Final report

The final report will be a document that contains the following:

- Detailed study methodology
- Discussion of the consulting team's findings, conclusions and recommendations regarding employee classification, salary structure, compensation philosophy, fringe benefits, compensation plan, estimated cost and implementation plan
- List of positions and the assignment of each to the compensation plan
- FLSA Status recommendations for all positions
- Salary and benefits survey results
- Job evaluation factor analysis for each position

Post contract maintenance

Baker Tilly Incorporated can provide ongoing assistance to clients after completion of a classification and compensation study. Post-contract maintenance services include assisting Isle of Palms with assignment of positions to the classification plan, determining the FLSA status of a new or revised position and conducting job evaluations for reclassification requests and new positions created by the City.

c. Work schedule

Baker Tilly takes pride in meeting its time commitments.

The schedule to commence this project coincides with Baker Tilly's completion of other studies. This will ensure that the proposed staff members will be available to concentrate on this study. Baker Tilly is prepared to initiate the study within after receiving two weeks after receiving the official notice to proceed and will complete the study within five months. A detailed project schedule is provided below.

There are factors that impact upon meeting the schedule that are beyond the consulting team's control. The proposed time frame is contingent upon a timely decision, the receipt of requested data, and the timely receipt of feedback and comments on the submitted preliminary data.

City of Isle of Palms, SC Classification and Compensation Study	
Activity	Target Date
– Authorization to proceed	November 16, 2020
– City completes initial data request	November 27, 2020
– Initial planning meeting, executive briefing, and employee communications	Week of December 7, 2020
– Electronic PAQ distributed	Week of December 7, 2020
– PAQ due to next-level supervisor for review	December 18, 2020
– PAQ due to Baker Tilly	December 30, 2020
– Baker Tilly submits salary, benefits and pay practices survey for City approval	January 13, 2021
– Baker Tilly distributes salary, benefits and pay practices survey to benchmark organizations	January 22, 2021
– Market survey due date	February 12, 2021
– Baker Tilly prepares draft salary structures and compiled salary survey results	March 5, 2021
– Baker Tilly prepares modified salary structures (as necessary, based on City feedback) and approximate implementation costs	March 19, 2021
– Baker Tilly submits final report and works with City to schedule final report presentation	April 9, 2021

5. References

The following references are for projects that Ann Antonsen, proposed Project Director for the City of Isle of Palms engagement, recently completed.

The following references will attest to Baker Tilly's ability to leverage our proven classification and compensation methodologies, tailor them to fit specific needs and concerns, and provide actionable implementation plans that consider the current and future situation of our clients.

City of Bellingham, Washington			
Name	Kaycee Johnson	Title	Human Resources Services Manager
Address	104 West Magnolia Street, Bellingham, WA 98225		
Phone	360-778-8234	Email	kdjohnson@cob.org
Services	Classification and compensation study for Teamsters bargaining unit		
City of Burnsville, Minnesota			
Name	Jill Hansen	Title	Human Resources Director
Address	100 Civic Center Parkway, Burnsville, MN 55337		
Phone	952-895-4471	Email	jhansen@burnsvillemn.gov
Services	Comprehensive classification and compensation study		
Cleveland County, North Carolina			
Name	Allison Mauney	Title	Human Resources Director
Address	311 East Marion Street, Shelby, North Carolina 28150		
Phone	704-484-4935	Email	allison.mauney@clevelandcountync.gov
Services	Comprehensive classification and compensation study		
City of Wheaton, Illinois			
Name	Holly Schulz	Title	Director of Human Resources
Address	303 West Wesley Street, Wheaton, IL 60187		
Phone	630-260-2015	Email	hschulz@wheatonil.us
Services	Comprehensive classification and compensation study; market survey and on-going support		

6. Detailed cost proposal

Professional fee

Baker Tilly will perform all the tasks delineated as described in this proposal for a professional fee of **\$16,575**. This fee is based on 39 positions, two employee orientation sessions as well as required meetings with administration, three implementation options and associated work outlined in this proposal. This proposal includes a maximum of two on-site visits by the project manager. In person site visits are subject to the City and/or Baker Tilly precautionary travel and personal contact measures in place due to COVID-19, for the safety of all employees. Baker Tilly maintains systems to facilitate virtual meetings for all study phases.

Baker Tilly would invoice the City for work completed based on the following schedule:

Time of Invoice	Percentage Invoiced	Cumulative Percentage
Completion of Project Initiation (or Employee Orientation)	25%	25%
Completion of Position Analysis Questionnaires	25%	50%
Distribution of Comprehensive Market Survey	20%	70%
Completion of Draft Pay Structure(s) or Pay Structure Updates	20%	90%
Completion of Final Report	10%	100%

Out-of-pocket expenses

Baker Tilly would charge the City of Isle of Palms, at cost, for actual out-of-pocket expenses. Out-of-pocket expenses include, but are not limited to, travel and sustenance, overnight or messenger deliveries, conference calling beyond our internal capabilities, photocopying and mailing costs. Direct out-of-pocket expenses are not expected to exceed **\$3,000** for the project.

Additional work

Should the City of Isle of Palms request and authorize additional work, we would invoice the City at an agreed upon fee or our standard hourly fees. Additional Implementation Plans will be billed at a cost of **\$750/plan**. In addition, we would charge, at cost, for any related out-of-pocket expenses.

Title	Hourly Rate
Principal, Partner, Firm Director	\$320
Director, Senior Manager	\$270
Manager	\$225
Senior Staff	\$195
Staff	\$165
Support	\$80

Additional work would include work outside the scope of services as agreed to including, but not limited to:

- Additional position descriptions
- Additional job audits
- Additional on-site meetings
- Additional reports
- Work related to a special request

Professional fee and project schedule

Our experience has shown that the greatest risk in a study of this nature is the City's ability to conduct an "apples to apples" comparison of the services recommended by different vendors. For example, various job evaluation/classification approaches, from the "slotting" of positions based on perceived internal equity considerations, to the development and implementation of quantifiable systems of job evaluation (which Baker Tilly has included with our SAFE® process), have been used successfully in local government. The City of Greeley, therefore, will no doubt be faced with the challenge of evaluating the various proposed methodologies, fee structures and timelines received as part of your procurement process.

Baker Tilly's staff understands the impact these differences have on project deliverables and would welcome the opportunity to discuss the advantages and disadvantages of each approach so the City can make an informed decision for its compensation study.

Finally, if Baker Tilly is identified as the most responsive provider, whether due to our detailed proposal, experience in similar environments or the strength and validity of our SAFE® process, but our professional fees or timeline exceed those of other submittals, we would be pleased to review the competing scope of services and prepare a best and final offer relative to those modified deliverable expectations.

Negotiations

If selected, we will provide the City of Isle of Palms with our standard engagement terms. Should the City wish to provide alternate terms or proceed on the basis of its own format agreement, we would require the ability to negotiate mutually acceptable terms and conditions prior to executing a final contract.

Appendix I: sample PAQ



Baker Tilly US, LLP
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www.bakertilly.com

Instructions for Completing Your Position Analysis Questionnaire

Please read these instructions before completing your Position Analysis Questionnaire (PAQ). This form is used to obtain information about your position and will be used to develop a class description. The questionnaire consists of multiple-choice and fill-in-the-blank questions; please be clear, accurate and complete. For multiple-choice questions, please check only the appropriate box on the left-hand side of the document; the right-hand box is for your supervisor or department/division head to complete; **check only one box per question, except for question 20 and the American with Disabilities Act section. Please complete and return the PAQ to your supervisor.**

Tips for Completing Your PAQ

- Spell out acronyms – acronyms may be exclusive to your department and mean something else nationally or to another part of the organization
- Minimum Requirements – Answer the questions based on the minimum requirements needed to perform the duties of the position - you may have 10 years of experience, but would a new hire need that to do the job?
- Priority/Description of Duties – Question number nine (9) is the most important question, which requests the priority and description of your duties. This question provides you the opportunity to explain your day-to-day duties in your words.
 - Give this question extra thought and provide your response as clearly and completely as possible, so that someone who has never met you or performed your duties may understand what your job entails.
 - Think about your day, week, month and even year on the job; some major duties are performed annually.
 - Begin with your most important duty and continue on down to the least important duty.
 - Try to keep the description to one-line or short phrases; begin each statement with a verb. Avoid paragraphs.
 - As a percentage, indicate the amount of time that it takes for you to complete each of the described tasks. Please keep in mind that the most important duty may not take the highest percentage of time.
 - Percentages should total 100%; it is strongly recommended that these percentages should be no smaller than 5%.

TO: Supervisors and/or Division/Department Heads

SUBJECT: **Instructions for Completing Position Analysis Questionnaire**

After the employee or group of employees under your day-to-day supervision has completed a PAQ, they should return them to you for your review and verification. You will want to check the appropriate boxes on the right-hand side of every page, either agreeing or disagreeing with the boxes the employee has checked on the left-hand side. There is a section on Page 5 where you can comment on the accuracy and completeness of the employee's response. Please note any comments in this section and **do not make any changes to employee responses.**

Position Analysis Questionnaire

[illegible]

Position Analysis Questionnaire

Supervisor Comments to Essential Functions

11. Current Title

Do you think your current position title appropriately reflects the work?

☐ Yes ☐ No

If No, please provide the title that would be more appropriate:

Supervisor Comments to Current Title

12. Education and Experience

Please indicate the minimum education and minimum experience level required to complete the normal, day-to-day tasks of this position:

Employee (check one)

Supervisor (check one)

- | | |
|---|--------------------------|
| <input type="checkbox"/> Less than High School Diploma or GED | <input type="checkbox"/> |
| <input type="checkbox"/> High School Diploma or GED | <input type="checkbox"/> |
| <input type="checkbox"/> Associate's Degree | <input type="checkbox"/> |
| <input type="checkbox"/> Bachelor's Degree | <input type="checkbox"/> |
| <input type="checkbox"/> Master's Degree | <input type="checkbox"/> |
| <input type="checkbox"/> PhD | <input type="checkbox"/> |
| <input type="checkbox"/> Other | <input type="checkbox"/> |

Required Degree Major or Coursework: _____

Years of Experience

- | | |
|--|--------------------------|
| <input type="checkbox"/> No experience | <input type="checkbox"/> |
| <input type="checkbox"/> Less than one year (minimal) | <input type="checkbox"/> |
| <input type="checkbox"/> One to three years (moderate) | <input type="checkbox"/> |
| <input type="checkbox"/> Three through five years (considerable) | <input type="checkbox"/> |
| <input type="checkbox"/> Six or more years (extensive) | <input type="checkbox"/> |

Specific Type of Experience Required: _____

13. Licenses, Certificates and Registrations

Please indicate if there are any licenses, certificates and/or registrations required to perform your job (e.g. driver's license). Spell out acronyms and abbreviations. (Supervisor's comments regarding this information may be provided in the Supervisor's Comments section)

Are these required: ☐ Upon Hire ☐ Within 6 months ☐ Within 1 year ☐ Within 2 years

If requirement is specific to the license, certification, or registration, please indicate timeframe by each one individually.

14. Special Training

Please indicate if there is any special training required to perform your job. (Supervisor's comments regarding this information may be provided in the Supervisor's Comments section)

Are these required: ☐ Upon Hire ☐ Within 6 months ☐ Within 1 year ☐ Within 2 years

If requirement is specific to the training, please indicate timeframe by each one individually.

Position Analysis Questionnaire

15. Work Complexity

Complexity and difficulty level associated with the tasks necessary to complete your work. Consider the level of judgment, analytical ability and creativity required and whether there are standards, policies and procedures that guide your actions.

- ☐ Regular and repetitive tasks, processes or operations requiring the selection and execution of actions based on defined procedures
- ☐ Fairly standard procedures and tasks where basic analytical ability is required, such as comparison of numbers and facts to select the correct actions. Detailed guidelines and procedures are generally used to make decisions or determine actions.
- ☐ Requires the application of a variety of procedures, policies and/or precedents and moderate analytic ability in adapting standard methods to fit facts and conditions.
- ☐ Considerable analytical ability is needed to select, evaluate, and interpret data from several sources; interpretation of guidelines, policies and procedures is required.
- ☐ Widely varied and involving many complex and significant variables, requiring analytical ability and inductive thinking in adapting policies, procedures, and methods to fit unusual and complex situations.

16. Work Level

Level of work required to complete your normal, day-to-day duties satisfactorily.

- ☐ Handles every day, reoccurring basic assignments and problems
- ☐ Handles a variety of typical assignments and problems independently.
- ☐ Senior or supervisory level; handles all assignments and problems except those requiring policy or procedural change
- ☐ Managerial in nature; directs all assignments and deals with all problems

17. Interpersonal Skills and Communication Skills

Skills required during your day-to-day duties:

- ☐ Little or no contact required except with immediate associates and direct supervisor.
- ☐ Regular contact within the department and periodic contacts with other departments, outside agencies and the general public.
- ☐ Regular contact within the department and other departments, outside agencies and general public (supplying or seeking information) on specialized matters.
- ☐ Outside and inside contacts to carry out organization programs or occasional contacts with officials at higher levels on matters requiring cooperation, explanation and persuasion, or work requiring enforcement of laws, ordinances, policies, and procedures.
- ☐ Regular contact with persons of importance and influence involving considerable tact, discretion, and persuasion.
- ☐ Continuing contact involving difficult negotiations calling for well-developed sense of timing and strategy; representing department or organization in policy settings.

Please list people or groups with whom you must interact and/or communicate in the performance of your job.

(e.g.: citizens, customers, clients, elected officials, supervisors, subordinates, consultants, engineers, etc.)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

18. Working Conditions

Conditions you are subjected to during your day-to-day duties:

- ☐ Absence of disagreeable conditions.
- ☐ Involves occasional exposure to some disagreeable elements (*dust, heat, fumes, cold, noise, vibration or wetness*) and accidents are improbable other than minor injuries.
- ☐ One or more elements above; involves frequent exposure to hazards where lost-time accidents are definitely possible
- ☐ Several elements above are occasionally present to the extent of being objectionable or regular exposure to work situations that could result in incapacitating accidents or, on occasion, loss of life.
- ☐ One or more of the above elements are regularly present and objectionable, or continuing exposure to work situations that could result in incapacitating accidents or periodic exposure to situations involving hazards that could result in total disability, critical illness or loss of life
- ☐ Continuous exposure to work situations involving hazards that could result in total disability, critical illness or loss of life, despite the provision and/or implementation of available safety measures.

19. Mental Stress and/or Effort

Conditions you are subjected to during your day-to-day duties:

- ☐ Limited mental effort and/or stress
- ☐ Some mental effort and stress involved resulting in inconvenience and frustration.
- ☐ Considerable mental effort and stress.
- ☐ Serious mental stress involved that could, over a period of time, result in temporary nervous disorder and severe mental anguish.
- ☐ Severe mental stress involved that could result in permanent nervous disorder/mental instability

Position Analysis Questionnaire

20. Level of Responsibility

How much freedom or independence is required or allowed in the performance of your normal day-to-day duties:

- ☐ Close supervision, or tasks are so routine and standardized that they do not require supervision.
- ☐ Moderate supervision within standard operating procedures; supervisor or senior workers are generally nearby to answer questions, make "judgment calls" and/or prioritize work.....
- ☐ Limited supervision with general autonomy in determining how objectives are achieved; supervisors generally set operating benchmarks, goals, and objectives
- ☐ General direction, based on broad goals and policies
- ☐ Involves setting policies and goals for the department or organization operation

21. Organizational Impact and Consequences

How your day-to-day duties impact the organization and the consequences of those duties:

- ☐ Supportive, informational, recording, or other services to assist others in producing correct and effective results; minor consequences ...
- ☐ Assisting and supporting others or individually providing data or facilitating services for use by others; minor to moderate consequences
- ☐ Daily actions or services affect individual clients/citizens; activity has moderate impact on specific cases in service area.
- ☐ Participating with others (within and/or outside of community/agency) in program development, service delivery and supervision of subordinate staff; moderate to serious impact
- ☐ Major individual impact on and accountability for end results affecting organizational unit or total community/agency.....

22. Supervision and/or Oversight

The scope and type of responsibility that you exercise as a supervisor or lead worker of other employees.

(Supervisor's comments regarding this information may be provided in the Supervisor's Comments section)

Do you supervise or have oversight of other positions: ☐ Yes, continue in this box ☐ No, continue to next section

Please check all that apply:

☐ N/A ☐ Work Group/Team ☐ Unit/Section ☐ Division ☐ Department ☐ Organization

List the positions by title, along with number of individuals within the position, that you have responsibility for:

_____	_____
_____	_____
_____	_____
_____	_____

For the positions listed above, do you effectively recommend or take action on the following:

Effectively Recommend	Take Action		Effectively Recommend	Take Action	
<input type="checkbox"/>	<input type="checkbox"/>	Hire	<input type="checkbox"/>	<input type="checkbox"/>	Suspend
<input type="checkbox"/>	<input type="checkbox"/>	Assign Work	<input type="checkbox"/>	<input type="checkbox"/>	Terminate
<input type="checkbox"/>	<input type="checkbox"/>	Direct Work	<input type="checkbox"/>	<input type="checkbox"/>	Discipline (Oral Reprimand)
<input type="checkbox"/>	<input type="checkbox"/>	Reward	<input type="checkbox"/>	<input type="checkbox"/>	Discipline (Written Reprimand)
<input type="checkbox"/>	<input type="checkbox"/>	Transfer	<input type="checkbox"/>	<input type="checkbox"/>	Evaluate Performance
<input type="checkbox"/>	<input type="checkbox"/>	Promote	<input type="checkbox"/>	<input type="checkbox"/>	Demote
<input type="checkbox"/>	<input type="checkbox"/>	Adjust Grievances	<input type="checkbox"/>	<input type="checkbox"/>	Coach and/or Counsel
<input type="checkbox"/>	<input type="checkbox"/>	Train	<input type="checkbox"/>	<input type="checkbox"/>	Develop Staff Schedules
<input type="checkbox"/>	<input type="checkbox"/>	Inspect Work	<input type="checkbox"/>	<input type="checkbox"/>	Other

**** Note, this section *does not* measure oversight of "programs" "projects" or 3rd party vendors/contractor. This section is asking what level of supervision to you have over other employees within your organization and how many employees.**

Position Analysis Questionnaire

Supervisor's Comments *(To be completed by immediate supervisor of employee)*

Are the statements provided by the employee accurate and complete? ☐ Yes ☐ No Please indicate any inaccuracies or incomplete items.

[illegible]

I certify that the answers to the above questions are my own and to the best of my knowledge and belief are correct and complete.

Employee Signature

Date _____

Supervisor or Dept/Div Head Signature

Date _____

Americans with Disabilities Act Supplemental Information Form

In order to assist in developing class descriptions which recognize and accommodate the requirements of the Act, each employee is requested to complete the attached ADA supplemental information form. Please check only those physical requirements or activities and sensory requirements that are **absolutely necessary** to perform the essential functions of your job and those environmental conditions which apply. **If options provided are not applicable, please do not check the corresponding box.**

The employee should check the appropriate box on the left side of the form. Supervisors should review information provided by the employee and verify the requirements of the position by checking the appropriate box on the right side of the form.

1. The physical requirements of this position.

Does this job require that weight be lifted or force be exerted? If so, how much and how often? Check the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Up to 10 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 25 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 50 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 100 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In excess of 100 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is being lifted: _____

2. The physical activity of this position.

How much on-the-job time is spent in the following physical activities? Show the amount of time by checking the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speak or hear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use hands to finger, handle or feel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climb or balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stoop, kneel, crouch or crawl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reach with hands and arms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taste or smell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push or pull	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repetitive Motions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee (check all that apply)

Supervisor (verify job requirement)

3. The sensory requirements of the position are:

Visual Acuity

- | | |
|--|--------------------------|
| <input type="checkbox"/> Standard vision requirements..... | <input type="checkbox"/> |
| <input type="checkbox"/> Close vision | <input type="checkbox"/> |
| <input type="checkbox"/> Distance vision | <input type="checkbox"/> |
| <input type="checkbox"/> Ability to adjust focus | <input type="checkbox"/> |
| <input type="checkbox"/> Depth perception..... | <input type="checkbox"/> |
| <input type="checkbox"/> Color perception | <input type="checkbox"/> |
| <input type="checkbox"/> Night vision..... | <input type="checkbox"/> |

Employee (check all that apply)

Supervisor (verify job requirement)

☐ Peripheral vision..... ☐
Vocal Communication
☐ Expressing or exchanging ideas by means of the spoken word. ☐
☐ Detailed or loud talking to convey detailed or important spoken instructions to others accurately, loudly, or quickly. ☐
Hearing Perception
☐ Ability to recognize information at normal spoken word levels. ☐
☐ Ability to receive detailed information through oral communications and/or to make fine distinctions in sound. ☐
Sensory Utilization
☐ Preparing and analyzing written or computer data..... ☐
☐ Visual inspection involving small defects and/or small parts ☐
☐ Use of measuring devices ☐
☐ Assembly or fabrication of parts within arm's length ☐
☐ Operating machines, including office equipment..... ☐
☐ Operating motor vehicles or equipment..... ☐
☐ Observing general surroundings and activities ☐
4. The environmental conditions the worker will be subject to in this position.

How much exposure to the following environmental conditions does this job require? Show the amount of time by checking the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Wet, humid conditions (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work near moving mechanical parts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work in high, precarious places	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fumes or airborne particles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic or caustic chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor weather conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme cold (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme heat (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk of electrical shock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with explosives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vibration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Breathing apparatus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exposure to blood borne pathogens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Typical Noise Level

Employee (check only one)

Supervisor (verify job requirement)

☐ Very Quiet (e.g. park trail, storage, or file room) ☐
☐ Quiet (e.g. library, private offices) ☐
☐ Moderate Noise (e.g. business office with typewriters and/or computer printers, light traffic) ☐
☐ Loud Noise (e.g. heavy traffic, large earth-moving equipment) ☐
☐ Very Loud Noise (e.g. jack hammer work, garbage recycle plant) ☐

Appendix II: project team resumes

Ann Antonsen

Ann Antonsen, a director with Baker Tilly, has been with the firm since 2005.



Baker Tilly US, LLP

Director

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United States

T +1 (651) 223 3057

M + 1 (612) 382 4491

ann.antonsen@bakertilly.com

bakertilly.com

Education

Bachelor of Arts, Psychology
University of Minnesota – Minneapolis

Ann is a consultant with a strong background in organizational management and human resources which she uses effectively in developing position analyses, classification and compensation studies, performance management, evaluation system development and staff training for the public sector. She is dedicated to using her well-honed abilities to assist governmental agencies in developing and growing meaningful legacies

Specific experience

- Performs organizational assessments and studies, revises and develops personnel policies and manuals and conducts organizational management training and provides general human resources assistance
- Strong background in organizational management and human resources
- Experience serving government organizations
- Provides human resources management services for large suburban communities and regional centers
- Human resources experience in both public associations and private corporations

Industry involvement

- International Public Management Association in Human Resources (IPMA)

Jada Kent, CCP

Jada Kent, a manager at Baker Tilly, has been with the firm since 2015.



Baker Tilly US, LLP

Manager

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Suite 300
Plano, TX 75093
United States

M +1 (940) 368 3033

jada.kent@bakertilly.com

bakertilly.com

Education

Master of Public Administration (MPA)
University of Texas – Dallas

Bachelor of Arts, U.S. History
University of North Texas (Denton, TX)

Jada is a Manager in the Plano, Texas office experienced in providing comprehensive classification and compensation services to public sector organizations. Prior to this role, she provided other Management Consulting Services within Baker Tilly, such as Organization Management and Executive Recruitment. Before joining Baker Tilly, Jada served in the United States Army and the Texas Air National Guard, respectively, as a Public Affairs Specialist.

Specific experience

- Base pay structure design
- Compensation philosophy design
- FLSA review; job classification/job architecture
- Job description development
- Job evaluation (Point Factor)
- Market survey and analysis
- Pay compression analysis
- Pay equity analysis
- Pay plan/project implementation
- Pay policy development
- Supervisor/management training
- Compensation consulting experience in Arizona, Connecticut, Florida, Indiana, Iowa, Louisiana, Michigan, Minnesota, Mississippi, Missouri, New Hampshire, New Mexico, North Carolina, Ohio, Oregon, Pennsylvania, Tennessee, Texas, Virginia, Washington, Wisconsin
- Compensation consulting experience with: Cities, Counties, State Legislatures, Judicial Branch, Libraries, Housing Authorities, Municipal Associations, Power Agencies, Transportation Authorities, Utilities, and Water/Wastewater Authorities

Industry involvement

- North Texas Compensation Association (NTCA)
- International Public Management Association for Human Resources (IPMA-HR)
- National Forum for Black Public Administrators (NFBPA), North Texas Chapter

Continuing professional education

- Certified Compensation Professional (CCP)

Brenda Turner, CCP

Brenda Turner, a project manager with Baker Tilly, recently joined the firm in 2020.



Baker Tilly US, LLP

Project Manager

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Suite 300
Plano, TX 75093
United States

M +1 (214) 543 3383

brenda.turner@bakertilly.com

bakertilly.com

Education

Master of Business Administration
University of Texas (Dallas, Texas)

Bachelor of Business Administration
Dallas Baptist University (Dallas, Texas)

Brenda is a project manager on the human capital team. She is experienced in providing compensation design, implementation and program management services in a variety of industries. Before joining Baker Tilly, Brenda served in compensation leadership and analyst roles in the airline and technology industries. She has also served in finance and accounting roles in the hospitality and technology industries.

Specific experience

- Compensation structure design and implementation, including market-based and point factor approaches
- FLSA and internal pay equity analysis and implementation
- Job documentation and job description development and publication
- Base salary, short term and long term incentive design and program management
- Executive compensation VP to C-Suite to CEO program design and management
- Organization transactions (M&A, IPO, Private Equity)
- Compensation management technology design, implementation and administration

Industry involvement

- World at Work (WAW)
- Society for Human Resource Management (SHRM)

Continuing professional education

- Certified Compensation Professional (CCP)

Jama McClung

Jama McClung, a consultant with Baker Tilly, has been with the firm since 2010.



Baker Tilly US, LLP
Senior Consultant
 9097 Atlee Station Road
 Suite 200
 Mechanicsville, VA 23116
 United States

T +1 (804) 622 6991
jama.mcclungl@bakertilly.com
 bakertilly.com

Education

Coursework completed
 Glenville State College (Glenville, West Virginia)

Currently completing coursework toward a bachelor's degree in Business Administration

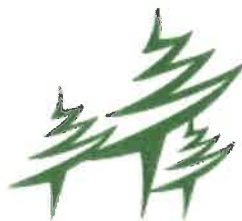
Jama joined Baker Tilly as part of the executive recruitment team. She now works as a consultant with the human capital team specializing in classification and compensation studies, performance evaluations and benefits review.

Specific experience

- Specialty focus is classification and compensation studies, performance evaluations and benefits review
- Performed prior consulting support work as a capital project assistant for healthcare IT financial system conversions and IT infrastructure upgrades
- Served as a public finance assistant supporting senior living and healthcare public finance bankers

A Proposal to Conduct a
Wage and Compensation Analysis
for the City of Isle of Palms, SC
RFP #2020-07

ORIGINAL



Evergreen Solutions, LLC

November 6, 2020

A Proposal to Conduct a Wage and Compensation Analysis for the City of Isle of Palms, SC RFP #2020-07

Submitted to:

Ms. Desirée Fragoso, City Administrator
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, South Carolina 29451

Submitted by:



Dr. Jeff Ling, President
Evergreen Solutions, LLC
2878 Remington Green Circle
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(850) 383-0111 (ph) / (850) 383-1511 (fax)

November 6, 2020



Evergreen Solutions, LLC

2878 Remington Green Circle - Tallahassee, Florida 32308
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November 3, 2020

Ms. Desirée Fragoso, City Administrator
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, South Carolina 29451

Dear Ms. Fragoso:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Wage and Compensation Analysis for the City of Isle of Palms. Our response is based on our review of your Request for Proposals (RFP #2020-07), our experience working with hundreds of local governments throughout the country, our understanding of the South Carolina labor market, and our knowledge of best practices in human resources management.

Evergreen Solutions was formed in 2004 to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is authorized to transact business in the State of South Carolina. Evergreen is located at 2878 Remington Green Circle, Tallahassee, Florida 32308 and employs nine full-time staff.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 46 states. In the State of South Carolina, Evergreen has worked with, or is currently on contract to work with, the following public sector clients in providing work similar in scope to the services being requested: City of Spartanburg; City of Columbia; City of Mauldin; City of Chester; City of Goose Creek; City of Conway; City of Lancaster; Spartanburg County; Berkeley County; Beaufort County; Dorchester County; Charleston County; Horry County; Orangeburg County; Town of Mount Pleasant; Town of Cheraw; Town of Hilton Head Island; Town of Mocks Corner; Charleston Park and Recreation Commission; Greenville Water; Municipal Association of South Carolina; Berkeley-Charleston-Dorchester Council of Governments; Housing Authority of Florence; North Charleston Sewer District; Spartanburg County Public Library; Richland Library; Richland County Recreation Commission; Richland County School Districts One and Two; Pickens School District; and Rock Hill Schools.

In other states, Evergreen has worked with, or is currently on contract to work with, the following local governments in a variety of human resources and management capacities: Mahoning County, OH; City of Bloomington, IN; City of Urbana, IL; Carter County, TN; Blount County, TN; City of Pittsburgh, PA; County of Montgomery, PA; Ulster County, NY; Town of Bridgewater, MA; Town of Colchester, VT; City of Hyattsville, MD; City of Baltimore, MD; City of Annapolis, MD; City of Hagerstown, MD; City of Westminster, MD; Allegany County, MD; Washington County, MD; Kent County Levy Court, DE; City of Newport News, VA; City of Suffolk, VA; City of Fredericksburg, VA; City of Covington, VA; City of Williamsburg, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Loudoun County, VA; Spotsylvania County, VA; King George County, VA; Alleghany County, VA; City of Raleigh, NC; City of Goldsboro, NC; Union County, NC; Gaston County, NC; New Hanover County, NC; Guilford County, NC; Transylvania County, NC; Franklin County, NC; Haywood County, NC; Buncombe County, NC; Spokane County, WA; City of Albany, OR; Columbia County, OR; City of Page, AZ; City of Flagstaff, AZ; City of Prescott, AZ; Town of Sahuarita, AZ; City of Santa Fe, NM; City of Carlsbad, NM; City of Manitou Springs, CO; City of Fountain, CO; Ouray County, CO; Ft. Bend County, TX; Hood County, TX; Brazoria County, TX; Denton County, TX; Kaufman County, TX; Travis County, TX; Town of Little Elm, TX; City of Austin, TX; City of Fate, TX; City of Pearland, TX; City of Seguin, TX; City of Rowlett, TX; City of Sachse, TX; City of Pflugerville, TX; City of Buda, TX; City of Farmers Branch, TX; City of Fredericksburg, TX; City of Gonzalez, TX; City of South Padre Island, TX; City of Conroe, TX; City of Amarillo, TX; City of Mont Belvieu, TX; City of Duncanville, TX; City of Sunset Valley, TX; City of Broken Arrow, OK; Sedgwick County, KS; City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; Jefferson

County, MO; Jackson County, MO; St. Charles County, MO; City of Sarasota, FL; City of Winter Park, FL; City of Palm Beach Gardens, FL; City of Sunrise, FL; City of St. Petersburg, FL; City of Hollywood, FL; City of Melbourne, FL; City of Orlando, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Alachua County, FL; Manatee County, FL; Pinellas County, FL; Palm Beach County, FL; Sarasota County, FL; City of Douglasville, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Garden City, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Dublin, GA; City of Dunwoody, GA; City of Roswell, GA; City of Tybee Island, GA; City of Chamblee, GA; City of Savannah, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Worth County, GA; Cherokee County, GA; and many others. Information regarding the services provided to some of these local governments as they relate to the services being requested can be found in **Section 1** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Isle of Palms because of our vast understanding of local government human resource management and the fact that we possess the necessary experience and expertise. Our team has significant expertise in conducting wage and compensation analyses and similar human resources work for local governments and other public sector organizations as can be seen in **Section 1**.

Some of the human resource services Evergreen has focused on include: wage and compensation studies; classification studies; salary and benefits surveys; staffing studies; workload analyses; performance evaluation and appraisal system design; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability.

Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management. As a result, our team knows how critical an effective a compensation and classification system is to the overall operation of a proficient and progressive municipality. Moreover, we have developed helpful methods and tools that assist our clients in implementing and maintaining our study recommendations and results.

Evergreen's approach to conducting a wage and compensation analysis draws not only from extensive human resources work with local government clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach identified in **Section 2** of our proposal include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, City administration, department heads, and staff need to be involved in each step of the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.
- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web. Further, our web-based **JobForce Manager** tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. Our proposal is valid for 120 after the proposal due date.

We appreciate this opportunity and commit to you our best effort if selected for this engagement. If you have any questions, please feel free to contact me at (850) 383-0111 or via email at jeff@consultevergreen.com.

Sincerely,

Dr. Jeff Ling, President



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Section 1.0

Statement of Qualifications



1.0 *Statement of Qualifications*

Evergreen Solutions, LLC is well qualified to conduct a Wage and Compensation Analysis for the City of Isle of Palms due to our experience in conducting hundreds of these studies for local governments and other public sector organizations across the country, including many in the State of South Carolina. In this section we provide you with the background and history of our firm, a list of similar projects we have conducted, or are currently on contract to conduct, and the qualifications of our proposed project team.

1.1 Firm's Background and History

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with public sector organizations, including hundreds of local governments, across the nation. We provide a unique approach, rather than the “consulting as usual” approach, by partnering with our clients to find innovative, real world solutions to public management.

Evergreen Solutions was formed in 2004 as a limited liability company – partnership to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen's philosophy is based on an understanding that there is not a “one size that fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is authorized to transact business in the State of South Carolina.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: wage and compensation studies; classification studies; salary and benefits studies; performance appraisal reviews; workload analyses; staffing studies; disparity studies; training assessments; and strategic planning.

We invite you to browse our Web site at www.ConsultEvergreen.com or visit us on Facebook at www.facebook.com or LinkedIn at www.linkedin.com for more information about our services, staff, and past experience.



Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes:

- full visibility into the entire organization through research and discovery;
- a spirit of partnership with staff and leadership;
- sound recommendations based on best practices and proven methods; and
- a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting wage and compensation analyses for local governments and other public sector organizations throughout the country, including South Carolina;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant South Carolina statutes and regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country.

Exhibit 1-1 includes a sample list of local government clients that Evergreen has worked with, or is currently on contract to work with, in a variety of human resources management consulting capacities. Evergreen has also worked with many other public sector organizations in South Carolina, including: Charleston Park and Recreation Commission; Greenville Water; Municipal Association of South Carolina; Berkeley-Charleston-Dorchester Council of Governments; Housing Authority of Florence; North Charleston Sewer District; Spartanburg County Public Library; Richland Library; Richland County Recreation Commission; Richland County School Districts One and Two; Pickens School District; and Rock Hill Schools.



Exhibit 1-1: Sample List of Local Government Clients

Spokane County, WA	City of Urbana, IL	City of Palm Beach Gardens, FL	Buncombe County, NC
City of Albany, OR	Mahoning County, OH	City of Panama City Beach, FL	Davie County, NC
City of Beaverton, OR	Marshall County, AL	City of Panama City, FL	Duplin County, NC
Columbia County, OR	City of Foley, AL	City of Kissimmee, FL	Franklin County, NC
City of Flagstaff, AZ	Baldwin County, AL	City of Sarasota, FL	Gaston County, NC
City of Page, AZ	Lee County, AL	City of Parkland, FL	Guilford County, NC
City of Prescott, AZ	City of Alpharetta, GA	City of Pensacola, FL	Haywood County, NC
Town of Sahuarita, AZ	City of Brookhaven, GA	City of Plantation, FL	Lee County, NC
Pima County, AZ	City of Chamblee, GA	City of Sunny Isles Beach, FL	New Hanover County, NC
City of Carlsbad, NM	City of Commerce, GA	City of Temple Terrace, FL	Transylvania County, NC
City of Hobbs, NM	City of Dahlgonega, GA	City of Venice, FL	Union County, NC
City of Santa Fe, NM	City of Dalton, GA	City of North Miami Beach, FL	City of Covington, VA
Ouray County, CO	City of Douglasville, GA	Alachua County, FL	City of Fredericksburg, VA
City of Fountain, CO	City of Dublin, GA	Bay County, FL	City of Newport News, VA
City of Manitou Springs, CO	City of Duluth, GA	Brevard County, FL	City of Suffolk, VA
Ogden City Corporation, UT	City of Dunwoody, GA	Charlotte County, FL	City of Williamsburg, VA
City of Amarillo, TX	City of Fayetteville, GA	Flagler County, FL	Alleghany County, VA
City of Austin, TX	City of Forest Park, GA	Gadsden County, FL	Chesterfield County, VA
City of Buda, TX	City of Garden City, GA	Gulf County, FL	County of Culpeper, VA
City of Conroe, TX	City of Kingsland, GA	Hernando County, FL	County of Northampton, VA
City of Duncanville, TX	City of Roswell, GA	Highlands County, FL	County of York, VA
City of Farmers Branch, TX	City of Savannah, GA	Leon County, FL	Essex County, VA
City of Fate, TX	City of Statesboro, GA	Manatee County, FL	Gloucester County, VA
City of Fredericksburg, TX	City of Stockbridge, GA	Martin County, FL	Isle of Wight County, VA
City of Lakeway, TX	City of Tybee Island, GA	Miami-Dade County, FL	James City County, VA
City of Lockhart, TX	City of Woodstock, GA	Monroe County, FL	King George County, VA
City of Mont Belvieu, TX	Cherokee County, GA	Osceola County, FL	Loudoun County, VA
City of Pflugerville, TX	Douglas County, GA	Palm Beach County, FL	Louisa County, VA
City of Rowlett, TX	Forsyth County, GA	Pinellas County, FL	Montgomery County, VA
City of Sachse, TX	Lumpkin County, GA	Santa Rosa County, FL	Prince George County, VA
City of Seguin, TX	Worth County, GA	Sarasota County, FL	Prince William County, VA
City of Sunset Valley, TX	City of Gainesville, FL	Seminole County, FL	Shenandoah County, VA
City of Portland, TX	City of Alachua, FL	Sumter County, FL	Spotsylvania County, VA
City of Padre Island, TX	City of Coral Springs, FL	City of Spartanburg, SC	Surry County, VA
Town of Little Elm, TX	City of Dania Beach, FL	City of Chester, SC	City of Baltimore, MD
Brazoria County, TX	City of Daytona Beach, FL	City of Columbia, SC	City of Annapolis, MD
Denton County, TX	City of Cape Coral, FL	City of Conway, SC	City of Hagerstown, MD
Fort Bend County, TX	City of Destin, FL	City of Goose Creek, SC	City of Hyattsville, MD
Hood County, TX	City of Doral, FL	City of Lancaster, SC	City of Westminster, MD
Kaufman County, TX	City of Fort Myers, FL	City of Mauldin, SC	Allegany County, MD
City of Broken Arrow, OK	City of Fort Walton Beach, FL	Town of Cheraw, SC	Charles County, MD
Sedgwick County, KS	City of Ft. Myers, FL	Town of Hilton Head Island, SC	Washington County, MD
City of Branson, MO	City of Jacksonville Beach, FL	Town of Moncks Corner, SC	Calvert County, MD
City of Lee's Summit, MO	City of Jacksonville, FL	Town of Mount Pleasant, SC	Kent County Levy Court, DE
Clay County, MO	City of Key West, FL	Beaufort County, SC	City of Kalamazoo, MI
Jackson County, MO	City of Lake City, FL	Berkeley County, SC	City of Pittsburgh, PA
Jefferson County, MO	City of Largo, FL	Charleston County, SC	County of Allegheny, PA
St. Charles County, MO	City of Winter Park, FL	Dorchester County, SC	County of Montgomery, PA
City of Bloomington, IN	City of Orlando, FL	Spartanburg County, SC	Ulster County, NY
Blount County, TN	City of Dunedin, FL	City of Goldsboro, NC	Town of Colchester, VT
Carter County, TN	City of St. Petersburg, FL	City of Raleigh, NC	Town of Bridgewater, MA



1.2 Select Relevant Experience

Because Evergreen has conducted over 600 projects that are similar in scope to the services being requested, we have included in this section only a sample of some of our local government work.

Classification and Compensation Study City of Lancaster, South Carolina

Evergreen Solutions was retained by City of Lancaster, SC to conduct a detailed compensation and classification analysis of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



Classification and Compensation Study City of Chester, South Carolina

Evergreen Solutions was engaged by the City of Chester to conduct a comprehensive compensation and classification study for all City employees. The Evergreen Team conducted orientations and focus groups with general employees. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and potential recommendations for revision to the current classification structure. Evergreen Solutions also conducted a comprehensive salary survey. The results will be combined with the internal hierarchy to help generate recommendations for a comprehensive compensation and classification structure. The Evergreen Team provided detailed recommendations for implementation of the new structure and related employee salary adjustments.



Comprehensive Classification, Compensation, Performance Management and Benefits Study City of Columbia, South Carolina

Evergreen Solutions was retained by the City of Columbia to conduct a comprehensive evaluation of the City's current compensation and classification structure for its 2,352 employees. The primary objective of the study was to determine whether the City's current pay structure, policies, and practices were effective as compared to peer organizations or whether future adjustments were needed. Evergreen's consultants conducted a job-task analysis/job audit of all employee positions to verify and validate information from existing job descriptions. Based on the data collected, Evergreen defined the essential functions of the job class, including, required



education, experience, knowledge, skills, and abilities, to ensure compliance with ADA regulations; identified discrepancies between existing and proposed classifications; reported areas that were understaffed or underutilized; identified management, supervisory, professional, technical and general employees, including each employee's FLSA status (exempt/non-exempt); evaluated and recommended other programs that could be implemented by the City to attract candidates for hard-to-recruit positions; and developed a tool that the City could utilize to evaluate and process future reclassifications.

To ensure external equity, Evergreen consultants compared the City to what other local jurisdictions were doing as it related to salary ranges, steps within ranges, and range spread, and listed options and made recommendations that could improve the City's position in the market and its ability to recruit and retain qualified employees. Evergreen reviewed policies and procedures to determine consistency with prevalent practices among City governments and other local jurisdictions related to setting salaries for new hires, and handling transfers, promotions, additional duty pay and retroactive adjustments.

Evergreen also developed and recommended a new and revised performance appraisal instrument(s) that would support the City's mission and strategic objectives and the City's compensation philosophy, and would work in concert with the classification and pay system that was established. Evergreen consultants worked with the Human Resources Department and other City officials to link the proposed performance evaluation system to the pay structure, and identified any real or perceived internal equity and salary compression issues within the City's various departments/offices, and listed options to address such questions as to how these issues were addressed by other municipalities.

In the end, Evergreen provided recommendations to the classification and compensation structure along with associated costs or savings of implementing those recommendations. Evergreen also provided training/education presentations to managers and senior management staff to ensure that there was an understanding and commitment to the new classification and compensation system.



Compensation and Classification Study City of Mauldin, South Carolina

The City of Mauldin retained Evergreen Solutions to provide oversight into the data collection process regarding compensation and classification as well as provide recommendations following the collection of the data for the City to transition into a purely merit-based pay system. The purpose of the study was to review the current structure that had not been updated in the last few years utilizing the position rating manual and position analysis questionnaire; review the salary survey methods and results collected from local municipalities and national IMCA data; verify overall grade placement and



internal equity for the organization as a whole; ensure external equity with the marketplace; and provide oversight on transition to performance management, merit-pay system. As part of the study, Evergreen reviewed the materials provided by the City and gave feedback on best practices and market trends; analyzed internal equity data collected by City and gave feedback to address internal equity; reviewed salary survey data collected by the City for accuracy and provided insight regarding findings; developed the strategic position for the City utilizing collected data and desired intentions of the City; and assisted the City with developing transition plan.



**Classification and Compensation Study
City of Goose Creek, South Carolina**

Evergreen Solutions was retained by the City of Goose Creek to conduct a Classification and Compensation Study. Evergreen reviewed the current classification system by including a job analysis, assessed job descriptions and made recommendations for changes; provided the tools necessary to maintain the classification system for future positions if a new classification system was recommended; and revised the current Compensation Plan based on the labor market. In the end, Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



**Classification and Compensation Study
City of Spartanburg, Spartanburg County, and Spartanburg County Public Library, South Carolina**

Spartanburg County was retained Evergreen Solutions to complete a Classification and Compensation Study. This study included services for the City of Spartanburg and the Spartanburg County Public Library. Evergreen established a timeline to determine project milestones for the County, Library, and City and evaluated current employee data for each entity. Evergreen developed a classification plan; worked with the County's Project Manager to identify and survey targets for a salary survey, and provided an external assessment summary based on the results of the survey; proposed strategic positioning recommendations; and conducted a final solution analysis. In the end, Evergreen created a report that described the classification and pay plan; recommended procedures for the implementation and continued maintenance of the plans.



Employee Compensation and Pay Classification Study City of Conway, South Carolina

Evergreen Solutions was retained by the City of Conway to conduct an Employee Compensation and Pay Classification Study. The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic area.



Salary Parity Study / Structural and Compensation Systems Study Charleston County, South Carolina

In 2005-06, Charleston County conducted a Classification and Compensation Review using another consulting firm. Then in 2007, Evergreen Solutions was hired by the County to review the results and verify the recommendations that accompanied the study. The primary issue examined by Evergreen was the internal equity relationships present within the County's pay plan. The Evergreen Team administered a job analysis tool to County employees that helped determine job worth and verify internal equity relationships as they relate to compensation. Although the study's primary emphasis was ensuring that internal equity relationships were proper, the study also ensured that employees were paid consistently with the market. Evergreen provided detailed recommendations for adjusting the County's pay and classification structure and developed an implementation plan complete with costing information.

Note: Evergreen was again hired to conduct a Structural and Compensation Systems Study. The Evergreen Team worked with elected official and employee committee throughout the process. Our phases included employee outreach, best practice research, and consensus building to recommend a 21st Century approach to compensation and classification management.



Comprehensive Market Analysis Charleston County, South Carolina

Evergreen Solutions was again hired to assist Charleston County with conducting comprehensive market analysis using selected benchmarks. A market survey was conducted to determine the external equity of the County against its peers.



Classification and Compensation Study Berkeley County, South Carolina

Evergreen Solutions was retained by Berkeley County to conduct a Classification and Compensation Study for 1,153 employees. Evergreen's consultants reviewed the County's current classification and compensation plan and recommended a consistent and competitive market position that the County could maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the County based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Pay and Classification Study Dorchester County, South Carolina

Evergreen Solutions was retained by Dorchester County Government to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the County. As part of the study, Evergreen conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the County. Finally, a detailed plan was developed to provide the County with specific steps to implement an equitable and competitive compensation and classification plan. **Note:** Evergreen was recently hired to perform an update to the County's Compensation Plan.



Classification and Compensation Study Services Beaufort County, South Carolina

Evergreen Solutions is engaged with Beaufort County to provide Classification and Compensation Study Services. The purpose of the study is to address changes in county operations and staffing over the past decades, which may have affected the type, scope, and level of work being performed. The objectives of the study are to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differentials between individual classes; and maintain a competitive position with other comparable governmental entities and private employers within the same geographic area. **Note:** This project is nearing completion.



Classification and Compensation Study/Wage and Compensation Study Town of Mount Pleasant, South Carolina

Evergreen Solutions was hired in 2011 to assist the Town of Mount Pleasant to assist with a Compensation and Classification Study. The Evergreen Team conducted employee orientation sessions, focus groups, job analysis, market assessment, and provided recommendations.

Evergreen was again hired in the later part of 2015 to conduct a Wage and Compensation Study and Benefits Survey. The purpose of the study was to evaluate the Town's present wage and compensation plan, as well as its benefit package against those of comparable municipalities and competitive businesses, analyze and amend job descriptions, and develop a recommendation for improving the Town's current performance evaluation process and the forms used in this process. Attention was paid to private employers that competed for similar, qualified employees in the labor markets comparable to the Town. Evergreen is providing ongoing support with regard to salary classification and creation of job descriptions for new positions as they occur, and reclassification of current positions when requested.



Classification and Compensation Study Town of Hilton Head Island, South Carolina

Evergreen Solutions was engaged with the Town of Hilton Head Island to conduct a Classification and Compensation Study for all its employees. The study included the following primary objectives: to conduct a thorough, complete and accurate class specifications/job descriptions for all positions; appropriate valuation of each position relative to other Town positions; and to develop a competitive total rewards package (salary and benefits) relative to similar positions in the market.

Evergreen provided written guidelines for maintaining class specifications/job descriptions, for evaluating/re-evaluating job class specifications/job descriptions and for maintaining model compensation structure (s). Evergreen further recommended pay administration policies to include, but not be limited to, policies regarding movement through ranges, adjustments within pay grades, adjustments for assumption of additional duties (temporary or permanent), reclassifications, promotions, transfers, demotions, career ladders, etc. and recommended reliable external market data sources for salary structure adjustments and determination of merit budget. Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future merit allocation approaches, considering changes to classification and compensation program and limited budgets. **Note:** Evergreen recently completed an update of the Town's Classification and Compensation Plan.



Pay and Classification Study Town of Moncks Corner, South Carolina

Evergreen Solutions is engaged with the Town of Moncks Corner to conduct a Pay and Classification Study for its employees. As part of the study, Evergreen will conduct orientation sessions, focus groups, and interviews. Employees will complete a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A market salary survey will be issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures will be recommended.



Salary and Benefits Review, and Analysis City of Hyattsville, Maryland

Evergreen Solutions was hired by the City of Hyattsville to conduct a Salary and Benefits Review and Analysis of all classifications. The process included a comprehensive review of market compensation averages using a detailed duties-based salary survey approach as well as a comprehensive benefits survey. Market position was determined, a compensation philosophy was developed and strategic positioning recommendations were made with the goal of providing the City a more equitable compensation model. **Note:** Evergreen was again hired to conduct a Compensation System Analysis for the City.



Classification and Compensation Plan Review City of Annapolis, Maryland

Evergreen Solutions was engaged with the City of Annapolis to conduct a Classification and Compensation Plan Review. The primary objectives of the study were to: review and revise the current classification system; review and revise job descriptions; determine relevant competitive markets by conducting a salary survey of selected peer organizations; propose guidelines for an improved or new compensation program; and provide recommendations to keep the current pay structure competitive.



Classification and Compensation Study Services City of Westminster, Maryland

Evergreen Solutions was retained by the City of Westminster to provide Classification and Compensation Study Services. The scope of work included the review and updating of the City's current job descriptions as well as providing technical assistance in the development of a comprehensive performance evaluation system to integrate with the new classification system. The primary study objectives for this study was to:



- develop a formal compensation philosophy for adoption by the Mayor and Common Council;
- identify comparable benchmark employers to guide the City's future employee salary and benefit decisions to facilitate the attraction and retention of high performance staff members, while being financially sustainable;
- establish a comprehensive job classification system using the approved job evaluation system that accommodates the City's needs for an internally and externally equitable, defensible, market sensitive, and easily administered system for all current and future positions within the City;
- train Human Resources staff to apply the adopted compensation philosophy to maintain the adopted classification and compensation system; and
- provide legally defensible classification specifications (ADA, FLSA, and any other applicable federal and state laws).



Compensation Study City of Hagerstown, Maryland

Evergreen Solutions was retained by the City of Hagerstown, MD to conduct a Compensation Study. Evergreen's consultants worked with the City to evaluate what type of pay plan would reinforce current and future goals. Evergreen identified external targets for surveying select positions. After conducting the market salary survey, Evergreen produced a pay plan for employees that best met the needs of the City and included the number of grade, steps, and ranges as well as recommendations for continued administration of the compensation system.



Compensation Study Allegany County, Maryland

Allegany County contracted with Evergreen Solutions to conduct a Comprehensive Compensation Study and analysis for the Office of the Sheriff. The Office of the Sheriff included the primary functional areas of Road Patrol and Correction Deputies at the county correctional facility. Evergreen understood that the Office of the Sheriff faced competitive pressure from other area law enforcement agencies. To alleviate this pressure, Evergreen designed a salary survey instrument and distributed it to an approved list of local peers. The survey took into account total compensation, including supplemental pay, insurance benefits, retirement, leave, and other tangible benefits. The results of the survey and the subsequently prepared report provided the County with recommendations to improve their competitive position and ability to recruit the best and brightest available persons for these key areas.



Wages and Salary Scale Study Washington County, Maryland

Evergreen Solutions was retained by Washington County to conduct a comprehensive study of the County's wages as they related to neighboring jurisdiction's wages and salaries—the purpose of which was to assure adequacy of pay and employee wages when compared to area private and public employees. Evergreen met with each Division Director to gather information regarding pay issues that were unique to their departments. Evergreen conducted a brief review of the method of classifying positions to ensure its adequacy in today's pay and classification environment. Using the current or revised classification system, Evergreen evaluated all positions and placed them in an appropriate "grade". Evergreen recommended a system the County could use in the years to come to evaluate job positions.



Classification, Compensation, and Benefits Survey Kent County Levy Court, Delaware

Evergreen Solutions was hired by Kent County Levy Court (KCLC) in Dover, Delaware to conduct a Classification, Compensation, and Benefits Study. Evergreen's consultants reviewed all current classification specifications and analyzed, documented, and validated the same for distinguishing characteristics, position definition and purpose, knowledge, skills, abilities, essential job functions, minimum qualifications, education and experience relevance and hierarchal consistency, conformity with ADA language relative to essential job functions (including physical and intellectual requirements), working/environmental conditions, supervision received and exercised, standby/call back responsibilities, and special requirements including licensing, regulatory, and certification requirements.

Evergreen conducted on-site interviews with employees, as well as appropriate supervisor and management personnel, to verify/clarify information received in the questionnaires and to ensure information regarding organizational structure, supervision, essential job duties, and working environment was accurately captured and reflected in the descriptions that were developed. Evergreen recommended updates proposed a new system utilizing a standardized rating system that analyzed each position against multiple evaluation criteria.

Evergreen also conducted a market salary and benefits survey of public sector organizations comparable to the County in size, population, economic climate, proximity to major cities, etc. The market survey included the hours worked per week by employees in each position in those comparable communities—in an effort to consider both internal and external equity—and was used to compare base annual salary for each position included in the study by minimum, midpoint, and maximum.

Utilizing the market survey results, comparable job descriptions, and other data collected, Evergreen prepared a recommended compensation plan



design and salary schedule to correspond to the classification plan and customized to reflect the County's pay progression policy and compensation philosophy. Evergreen recommended the vertical salary relationship and/or differentials between classes in each class series. In the end, Evergreen provided KCLC with a final report that included specific, itemized recommendations, including a discussion of the methods, techniques, and data used to develop the classification and compensation plan and benefits program.



Salary Plan Review City of Suffolk, Virginia

Evergreen Solutions was retained in 2015 by the City of Suffolk to review the Compensation and Classification Study Final Report completed in 2009 by another firm. The goal of this review was to assess the applicability of recommendations since the study's completion, with an emphasis on reviewing: Phase 3 recommendations and applicability given time since completion of study; salaries of employees included in the 2009 study and those not included in the 2009 study (~300 employees hired after study completion) to assess internal equity; title changes recommended; and the City's Compensation Philosophy. In the end, Evergreen provided a final report that included: a comparison of current market compensation data (obtained primarily from TechNet database) to City compensation data; recommendation for placement of all employee salaries for both employees included and not included in the 2009 study; a recommended pay plan/salary schedule; and a recommendation to address compression caused by Phase in approach across all employee groups, including police and fire.

Note: Evergreen Solutions was previously hired by the City of Suffolk to conduct a Compensation and Classification Study. Evergreen consultants assessed both internal and external equity of the City's compensation and classification plan, and provided recommendations for a new plan to cover the City's approximate 1,000 employees.



Pay and Classification Study City of Williamsburg, Virginia

Evergreen Solutions was retained by the City of Williamsburg to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the marketplace to determine the appropriate pay levels for all jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



Classification and Compensation Study City of Fredericksburg, Virginia

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Classification and Compensation Study. Evergreen conducted a full job analysis of City positions and revised, if necessary, existing job descriptions based upon the findings of the job analysis. Evergreen also surveyed the local labor market to ensure that the City's overall package of compensation and benefits was competitive and evaluated whether the City's current human resources policies were affecting the City's ability to compete in the labor marketplace.

Evergreen assisted the City in updating its current classification and compensation plan and developing a strategy to increase employees' pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations to the overall classification and compensation plan that provided internal equity and that was competitive in the marketplace to attract and retain qualified employees.



Classification and Compensation Study County of Culpeper, Virginia

Culpeper County retained Evergreen Solutions to assist with a comprehensive classification and compensation study of all its employees. The study involved conducting a job analysis through desk audits, interviews, and focus groups. A more detailed analysis was performed on clerical and law enforcement staff. A salary and benefits survey was also issued to peers to assess the County's current market position. Recommendations were made for all employees to address job and compensation changes.



Classification and Compensation Study Gloucester County, Virginia

Evergreen Solutions was retained by Gloucester County to conduct a detailed compensation and classification analysis of its non-faculty employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



Compensation Study (Salary and Benefits) Louisa County, Virginia

Evergreen Solutions was retained by the Louisa County to conduct a Compensation Study. Evergreen's consultants reviewed the effectiveness of the County's current pay plan as it related to the market competitiveness for attracting and retaining quality employees. Pay ranges as well as benefits were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current compensation system.



Classification and Compensation Study Essex County, Virginia

Evergreen Solutions was hired by Essex County to conduct a Classification and Compensation Study that will allow the County to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants will perform the following: survey each unique job class to determine a definition of the job class, essential functions, education requirements, experience, knowledge, skills, and abilities, and review and update existing job descriptions, as needed; review the County's current pay practices including overtime pay, awarding compensatory time, half-time pay for emergency services, and all other pay for public safety; prepare a cost analysis for employees in positions that fall below the proposed minimum salaries following reclassification; and recommend appropriate salary range for each existing or proposed position based on the classification plan, the compensation survey results, and internal relationships and equity.



Classification and Compensation Study (Phase I) Loudoun County, Virginia

Evergreen Solutions was engaged with Loudoun County to conduct a Classification and Compensation Study. Evergreen conducted a comprehensive review and evaluation of the County's compensation philosophy and competitive market and made recommendations to retain, modify and/or change the compensation philosophy and/or competitive market. Evergreen also conducted a comprehensive review and evaluation of policies governing the County's total compensation program (pay and benefits offerings) and classification system; benchmarked the elements of the County's total compensation and classification program against its current competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify and/or change elements of the total compensation and classification program.

Evergreen further conducted a comprehensive review and an evaluation of the County's performance plan system; benchmarked the County's system



against the job description systems of its competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify, or change the current system. In the end, Evergreen provided comprehensive recommendations for modifying classification and compensation policies and procedures.



Classification and Compensation Study (Phase II) Loudoun County, Virginia

Evergreen Solutions was again hired by Loudoun County to conduct a Classification and Compensation Study (Phase II). Evergreen will accomplish the objectives of the Phase II of the study by performing the following tasks:

- develop recommendations on a strategy to implement and administer a compensation philosophy range of 95 percent to 105 percent of the comparator market.
- conduct a comprehensive benchmark market analysis of all County jobs.
- develop a new market competitive pay plan to include an open range pay plan for the general workforce and a “grade and step” pay plan for Public Safety positions.
- provide recommendations for any additional pay incentives and supplements that would assist in maintaining competitive pay as described in Loudoun’s compensation philosophy as stated below.
- develop a new comprehensive classification system that allows for more levels and specificity within and across each job group, to include the development of standardized job descriptions.
- obtain an analysis of pay compression within the County and recommendations for addressing pay compression once a new pay plan is implemented; and
- develop recommendations for revisions to the Board approved classification and compensation policies found in Chapter 5 of the Human Resources Handbook.

Note: This project is nearing completion.



Classification and Compensation Study Chesterfield County, Virginia

Evergreen Solutions is on contract with Chesterfield County to conduct a Classification and Compensation Study and Pay Plan Development for Public Safety. The study will include an examination of the County's classification and compensation system in order to make recommendations for compensation policies, practices, and procedures; and develop a Public Safety Pay Plan. Evergreen will work with the County to develop a comprehensive plan for County employees based upon an objective analysis and thorough evaluation of job content and internal equity. Evergreen will review current job descriptions, salary relationships, classifications, and grade methodology. Based on this review and a compression analysis, Evergreen will recommend pay and classification strategies for the County. Evergreen will also identify and recommend pay incentives and supplements for employees; and policies and procedures to administer the new Public Safety Pay Plan. **Note:** This project is nearing completion.



Compression Analysis City of Raleigh, North Carolina

City of Raleigh retained Evergreen Solutions to analyze compression in its fire and police pay plans and recommend conversion options for open range pay plans. The study included a comprehensive review of employee placement, promotional practices, and systematic inequities. Evergreen Solutions recommended several alternatives for improving current pay differentials and managing City pay practices in the future.



Compensation and Classification Study City of Goldsboro, North Carolina

Evergreen Solutions was engaged with the City of Goldsboro to conduct a Compensation and Classification Study. Evergreen's consultants evaluated the current compensation and classification systems for the City; conducted a market survey of comparable peer organizations; developed a Final Report that outlined the methodology used to conduct the compensation and classification study, documented the results of the study, including all market research; and developed recommendations for the administration of the new or updated compensation and classification systems.



Pay and Classification Study Buncombe County, North Carolina

Evergreen Solutions was retained by Buncombe County to conduct a Pay and Classification Study. Evergreen Solutions conducted a classification analysis using Evergreen Solutions' Job Assessment Tool job evaluation methodology in addition to a statistical assessment of current conditions. Evergreen Solutions also analyzed local market and benefits data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation and classifications plan were made and procedures for the continued maintenance of the plans were provided. This study included



Compensation and Classification Study Union County, North Carolina

Evergreen Solutions was retained by Union County to conduct a Compensation and Classification Study. Evergreen Solutions performed the following tasks:

- conducted a comprehensive evaluation of every classification within the County to determine relative worth within the organization (internal equity), placement in the organizational pay plan and for the establishment of pay bands;
- established appropriate benchmarking standards and included should be a comparison and analysis of salaries and wages of like or similar jobs (external equity) in comparable government and private employers in North Carolina, South Carolina and Virginia for which the County competed for a labor supply;
- created class/position descriptions that included required knowledge, skills and abilities (KSA) for each position class in a standardized format. The analysis produced a sampling that produced statistical reliability and valid results;
- recommended needed changes to the existing compensation & classification plan to alleviate salary compression issues;
- provided a multi-year implementation plan to adjust compensation as identified in analysis;
- provided a synopsis prepared for management review, covering the salient features of the proposal including overall costs and term of work; and
- provided a procedure manual and training for Human Resources employees that enable them to maintain the recommended classification and compensation plan.



Compensation and Classification Study Transylvania County, North Carolina

Evergreen was retained by the Transylvania County to conduct a Compensation and Classification Study. Evergreen evaluated the current compensation and classification plan and identified the classification of existing positions. Evergreen identified appropriate benchmarking standards and conducted a total compensation survey with comparable municipalities and private sector employers, when applicable. Survey data was provided to the County in a usable electronic format for analysis for each position. Evergreen conducted a solution analysis and developed strategic positioning recommendations. Evergreen reviewed the total compensation system, identified potential pay compression and/or inequities (both internally and to the market), and provided recommendations.



Comprehensive Position Classification and Compensation Study Gaston County, North Carolina

Evergreen Solutions was engaged with Gaston County to conduct a Comprehensive Position Classification and Compensation Study for its employees (1,410 full-time, 46 part-time, and 143 temporary). The primary objective of the study was to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allowed the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen Solutions' consultants performed a comprehensive review of the County's classification and compensation system which included conducting an internal equity analysis of employee salaries.

Evergreen Solutions provided recommendations to create a system that not only aligned with the State of North Carolina's substantially equivalency requirement, but allowed for flexibility so as not to inhibit those departments that were not required to have this alignment.



Classification and Compensation Study and Benefits Survey New Hanover County, North Carolina

Evergreen Solutions was retained by New Hanover County and the New Hanover Alcohol Beverage Control Board to conduct a Classification and Compensation Study for its employees. Evergreen Solutions' consultants conducted an employee classification and compensation study of public and private employers who were providing equitable services and, based on that study and determined if individualized position/job descriptions were needed, and if so, assisted in the development of those descriptions. Evergreen Solutions prepared a comprehensive analysis that identified New Hanover County's competitive position in the labor market and provided a recommendation for total salaries and benefits, including the total



compensation package of insurance and other benefits (including paid leave), and prepared recommendations for compensation policies, including variable incentive pay options, to maintain competitiveness, reward employees, and ensure equity.

Select County and ABC Board members were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.



Salary Equity Study Guilford County, North Carolina

Evergreen Solutions was retained by Guilford County to assess pay equity based on race and gender for all County employees. Evergreen's consultants performed a review of approximately 1,500 plus positions for internal salary equity. This was accomplished by reviewing the incumbent's related education and experience prior to County employment and related experience gained with the County. Evergreen's consultants also reviewed job descriptions, in conjunction with County Staff, to ensure that content and titles were current, accurate and were consistent with FLSA, EEO and ADA considerations. At the conclusion of the study, Evergreen made recommendations by individual position/employee for internal salary equity pay adjustments and provided an analysis that included a statistical treatment of pay placement and progression.



Compensation, Classification, and Benefits Study Haywood County, North Carolina

Evergreen Solutions is retained by Haywood County to conduct a Compensation, Classification and Benefits Study. Evergreen's consultants will review the County's current pay grades and classification information; conduct salary and benefits surveys of the County's peers; make recommendations to update or restructure the County's pay grades and classification system; and provide revised job descriptions for the updated/restructured classification system. **Note:** This project is nearing completion.



Classification System and Pay Plan Development Study Franklin County, North Carolina

Evergreen Solutions was retained by Franklin County to conduct a Classification System and Pay Plan Development Study. The Evergreen Team worked with the County to obtain the current classification system and pay plans. After an initial assessment, Evergreen consultants collected data using the Job Assessment Tool© and conducted market salary and benefits surveys to develop recommendations for strategic positioning, a new job classification, and compensation and position evaluation system based on analyses of the data gathered.



Employee Classification and Compensation Study Blount County, Tennessee

Evergreen Solutions was retained by Blount County to conduct an Employee Classification and Compensation Study for its workforce. Evergreen conducted focus groups and interviews with employees and employees completed a Job Assessment Tool (JAT) that identified work performed. Evergreen presented to the Human Resources Director and Mayor any resultant classifications recommended in the classification study and provided for the maintenance of the new structure, including periodic review, reclassification review procedure and promotion guidelines.

For the compensation study, Evergreen identified survey labor market and benchmark classes to use for a market analysis; conducted a comprehensive compensation search utilizing other similar public sector employers; completed internal salary relationship analysis, including the development of appropriate internal relationship guidelines; developed externally competitive and internally equitable salary recommendations for each class included within the study in order to maintain appropriate competitive position in relation to other employers within the region; and assigned a salary range to each classification which reflected the results of the market survey and the analysis of internal relationships. Evergreen presented survey results to management to make a decision on overall pay philosophy. In the end, Evergreen recommended appropriate premium pay options to supplement the compensation plan. Examples included options for pay for certifications, professional licenses, special skills, temporary "acting" assignment at higher level duties, "on-call" and "callout" pay, pay alternatives for exempt level workers not normally eligible for overtime, and similar pay practices.



Compensation Plan Update Blount County, Tennessee

Evergreen Solutions was again retained by Blount County in late 2017 to conduct a Compensation Plan Update. Evergreen assessed the current conditions of the current pay plan; used County approved targets and benchmarks to conduct a salary survey; provided recommendations for updates/changes to the pay plan to compete with the labor market at a more competitive position (~ 70th percentile); provided recommendations for implementing the new pay structure; provided recommendations for revisions to pay practices as appropriate; provided recommendations for merit pay practice to differentiate salary increases based on employee performance; and prepared and delivered a draft and final report.



Comprehensive Classification and Compensation Study Carter County, Tennessee

Evergreen Solutions is retained by the Carter County Government to conduct a Comprehensive Classification/Compensation Study. Evergreen's consultants will work with County management to develop an employment/wage strategy consistent with the County's employment goals. To accomplish this, consultants will be conducting focus groups and interviews with selected employees; review employees completed Job Assessment Tools (JAT). A labor market survey of the County's peers in the County's target employment area will be conducted to assess the County's market competitiveness. Draft and final reports will be provided to the County summarizing the study. Finally, Evergreen's consultants will work with the County's management to update or create accurate job descriptions, as needed.



Salary and Benefits Study City of Bloomington, Indiana

Evergreen Solutions was retained by the City of Bloomington to conduct a Salary and Benefits Study. Evergreen examined the wages and benefits of the City's employees (including transit) as compared to public and private sector entities in Indiana and surrounding areas to determine whether the City's wages and benefits were competitive in the market.



Classification and Compensation Study Services City of Urbana, Illinois

Evergreen Solutions is engaged with the City of Urbana to provide Classification and Compensation Study Services. The City of Urbana seeks to achieve the following goals: 1. Maintain a high level of employee satisfaction by providing a classification and compensation system that is both fair and competitive. 2. Demonstrate fiscal responsibility to the community by providing a classification and compensation system that makes the best of The City's financial resources. 3. Ensure a close alignment between pay and performance by providing a classification and compensation system that rewards merit.



Employee Compensation and Classification Study Mahoning County, Ohio

Evergreen Solutions was retained by Mahoning County to conduct an Employee Compensation and Classification Study for all the County's 1,746 employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were further analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen consultant's also reviewed and updated existing job descriptions and determined FLSA designations for each job title/classification. Evergreen designed an implementation strategy for the compensation system with the lowest financial impact on the County's operating budget and with the greatest gain to positions that fell outside of a designated range. In the end, recommendations were made to improve the fairness and equity in the current system.



Compensation Study County of Montgomery, Pennsylvania

Evergreen Solutions was retained by the County of Montgomery to conduct a Compensation Study. The study included an examination of the County's compensation plan in order to provide recommendations for compensation policies, procedures and practices that provided internal equity and allowed the County to be competitive in the marketplace for attracting and retaining qualified employees

Evergreen recommended and identified a market position for Montgomery County by administering a comprehensive labor market salary survey to select public and private sector peers. Evergreen also conducted a comparative analysis of benefits provided in the market that included PTO, health, dental, vision and prescription, including percentage of contribution



between employee and employer, long term disability (LTD), life insurance and pension benefits.

Evergreen then recommended appropriate salary ranges (i.e., min, mid, and max) for all non-represented classifications. Evergreen prepared a cost analysis for the recommended salary ranges.



Compensation and Classification Analysis Ulster County, New York

Evergreen is retained by Ulster County to conduct a compensation and classification analysis and benefits survey to determine internal equity and external competitiveness with comparable counties to ensure its compensation program is competitive. Evergreen will evaluate and build a projected classification plan and conduct a market survey to provide external assessment. Evergreen will also develop strategic positioning and compensation administration recommendations for the County. Finally, Evergreen will provide revised class descriptions and FLSA determinations.



Compensation and Pay Classification Plan Study City of Foley, Alabama

Evergreen Solutions was retained by the City of Foley to conduct a Compensation and Pay Classification Plan Study. The objectives of the study were to conduct and implement a total compensation plan (including benefits) structure for the City's workforce which would provide both internal and external equity, establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, determine and implement a program of accurate job descriptions based on job analysis, and develop a maintenance program for job descriptions and classification recommendations.

Evergreen conducted a wage and benefit survey among competing jurisdictions as well as public and private organizations to determine competitive wages in the appropriate labor market(s). Using the survey results, Evergreen assigned each job to a pay grade with a view toward achieving proper internal relationships among classes and making salary ranges competitive with relevant markets with due consideration of the financial condition of the City. Evergreen provided estimates of the cost to install and implement the new pay plan and recommended a methodology for implementation.



Classification and Compensation Study Baldwin County, Alabama

Evergreen Solutions was retained by Baldwin County to conduct a Comprehensive Classification and Compensation Study for its 973 employees. Evergreen consultants conducted a job analysis, evaluated and revised job descriptions, conducted a market salary survey, developed a new pay plan based on the market results and job analysis, and prepared and presented a final report that recommended a new classification and compensation structure for the County.



Compensation and Benefits Study and Analysis City of Dahlonaga, Georgia

Evergreen Solutions was engaged with the City of Dahlonaga to conduct a comprehensive classification, compensation, and benefit study and analysis of its workforce. Evergreen's consultants evaluated the City's present salary and benefit structure as compared to the relevant job market for comparable positions in both the private and public sectors. Evergreen reviewed all current job descriptions and analyzed the same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions and special requirements, including licensing and certifications. Evergreen also analyzed all existing job family classifications, pay grades and salary ranges, and recommended modifications as necessary as well as analyzed all existing FLSA classifications and recommended modifications, as necessary.



Classification and Compensation Study City of Douglasville, Georgia

Evergreen Solutions was retained by the City of Douglasville to conduct a Classification and Compensation Study and Analysis of its workforce consisting of 225 full-time employees in approximately 96 job titles.

Evergreen performed the following tasks:

- Evaluated the City's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors.
- Reviewed all current job descriptions and analyzed same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing



characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); and special requirements including licensing and certifications.

- Reviewed the City's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments.
- Analyzed all existing job family classifications, pay grades and salary ranges and recommended modifications as necessary.
- Analyzed all existing FLSA classifications and recommended modifications as necessary.
- Identified potential pay compression issues and provided alternative solutions.



Compensation Analysis City of Alpharetta, Georgia

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers— both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of the study, the City of Alpharetta employed 414 full-time and five part-time positions, excluding senior management and elected officials, defined across 132 position descriptions. The base salary ranges for these positions were divided among eight pay grades.

The primary goals of this project were to: determine the City's competitive position within the marketplace in terms of its overall compensation package; determine the relative value and competitive positioning of each compensation/benefit area; and identify any weaknesses within the components of the City's existing compensation package that may negatively impact the organization's ability to attract and retain talented employees.



Employee Classification and Compensation Study City of Savannah, Georgia

Evergreen was engaged with the City of Savannah to conduct an Employee Classification and Compensation Study for its workforce of 2,500 employees. Evergreen developed a comprehensive job classification system that accommodated the City's need for a flexible, internally and externally equitable, defensible, market sensitive and easily administered system for all current and future jobs within the City. Evergreen established career paths for occupations, provide clear distinctions in different job levels, established performance standards/job qualifications for all newly created job classifications, produced job descriptions that were legally defensible and are in accordance with ADA and FLSA, assigned classifications to pay ranges designed by the City that were labor market appropriate, and trained Human Resource staff so that they could maintain, enhance, and use the classification system to identify and consistently apply the system to modify an existing position or classification or create a new position or classification scheme.

Evergreen further assisted the City in formulating a formal compensation philosophy and developing a compensation system for all job classifications based upon the adopted compensation philosophy. Evergreen identified comparable benchmark employers to guide the City's future employee salary and benefit decisions in order to facilitate the retention and attraction of high performing staff members, while being financially sustainable.



Comprehensive Classification and Compensation Study City of Garden City, Georgia

Evergreen Solutions was retained by the City of Garden City to conduct a Comprehensive Classification and Compensation Study for its workforce. The primary objectives of the Classification and Compensation Study were to: attract and retain qualified workers who would be paid equitable salaries; provide fair salaries for all workers of the City; and provide a salary structure that enabled the City to maintain a competitive position with other cities and companies within the same geographic area. To accomplish this, Evergreen: worked with the City's management staff to identify a market position for the City; developed a comprehensive labor market salary survey for the Chatham County area and surrounding municipalities that reflected both cities and private industry; analyzed existing internal hierarchy based on job relationships, identified problem areas within the internal hierarchy system, and proposed implementation methods to correct identified problems; reviewed current classification grade methodology, and proposed recommended strategies for the City of Garden City; and developed a pay plan identifying specific parameters (i.e., percent spreads between ranges and within ranges). In the end, Evergreen prepared a cost analysis for positions that fell below the proposed minimum salaries following reclassification and developed recommendations and an instrument for the ongoing internal administration and maintenance of the proposed classification/compensation plan.



Comprehensive Classification and Compensation Study City of Tybee Island, Georgia

Evergreen Solutions was retained by the City of Tybee Island to conduct a Comprehensive Compensation and Classification Study. Evergreen's consultants reviewed the City's current compensation plan (salary grade levels and steps) to understand the current challenges of recruiting and retaining employees and identified and recommended a consistent and competitive market position that the City could strive to maintain based on a salary survey of both private and public sector peer organizations. In the end, Evergreen recommended an appropriate salary range for each position in the City based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity.

Evergreen prepared a new salary structure based on results of the salary survey and best practices and developed guidelines to assist the City staff with determining the starting pay for new employees based on knowledge and experience above minimum requirements of the position, how difficult the position is to fill, and market competitiveness. Evergreen further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



Salary and Benefits Survey City of Roswell, Georgia

Evergreen Solutions was retained by the City of Roswell to conduct a Salary and Benefits Survey. Evergreen examined wages and benefits of the City's employees as compared to public and private sector entities in Georgia and surrounding areas to determine whether the City's wages and benefits were competitive in the market.



Compensation Study City of Statesboro, Georgia

Evergreen Solutions was engaged with the City of Statesboro to review and update the City's Classification and Compensation Plan for its 300 employees. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results.



Classification and Compensation Plan Development City of Brookhaven, Georgia

Evergreen Solutions was engaged with the City of Brookhaven to develop a Classification and Compensation Plan. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; determine the relative value and competitive positioning of each compensation area; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results. Evergreen also recommended a performance management and evaluation program, including a comprehensive evaluation form and rating system for fiscal year 2016 implementation. The evaluation plan included a performance based component.



Compensation and Benefits Study Forsyth County, Georgia

Evergreen Solutions was engaged with Forsyth County to conduct a Compensation and Benefits Survey for the various departments/offices of the County. The objective of the survey was to provide Forsyth County Government a competitive position with other comparable government entities and private employers within the same geographic area to attract and retain qualified employees. Evergreen's consultants reviewed the current compensation plan and salary grade levels to understand the current challenges facing the County in recruiting and retaining employees. Evergreen surveyed comparable labor markets competing with the County for labor in the greater metro Atlanta labor market and comparable public organizations. The survey was designed to capture not only base salary information but comprehensive benefits information (inclusive of: deferred compensation; leave plans; employer paid medical, dental, vision, disability insurance, life insurance) to ensure that the County was competitive with other public organizations in the greater metro Atlanta labor market in its total compensation package.

In the end, Evergreen prepared a final report of findings with written recommendations regarding specific classifications, salary market adjustments, and preferred benefit package and recommended any necessary salary range changes for the County's job classifications.



Classification and Compensation Study and Analysis Douglas County, Georgia

Evergreen Solutions was engaged with Douglas County to conduct a Classification and Compensation Study and Analysis. Evergreen evaluated the County's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors. Evergreen performed the following tasks:

- reviewed all current job descriptions and analyze same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions & summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); special requirements including licensing and certifications;
- reviewed the County's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments;
- analyzed all existing job family classifications, pay grades and salary ranges and recommend modifications as necessary;
- analyzed all existing FLSA classifications and recommended modifications as necessary;
- established appropriate benchmarking standards and conducted salary surveys as needed for similar positions with comparable Georgia counties as required;
- identified potential pay compression issues and provided alternative solutions; and
- develop applicable classification/reclassification questionnaire.



Classification and Compensation Study Lumpkin County, Georgia

Evergreen Solutions was engaged with Lumpkin County to conduct a comprehensive classification and compensation study of its workforce which assisted the County in updating its current classification plan, revising salary administration guidelines, and developing a strategy to increase employees' pay to a competitive level that would align with the results of the study.



Evergreen provided recommendations to the overall classification, compensation, and performance plan that provided internal equity and would be competitive in the marketplace to attract and retain qualified employees. Evergreen provided options on ways to keep the pay structure current in future years in order to avoid compression and provided the necessary training for the implementation of the new salary schedules and plans. Evergreen provided the County with multiple pay scales for both part- and fulltime employees, including pay scales for employees of the Sheriff's Office and Emergency Services.



Compensation Study City of Orlando, Florida

Evergreen was retained by the City of Orlando to provide human resources consulting services by conducting a compensation study. Evergreen reviewed the City's compensation system, selected targets and benchmarks for market comparison, conducted a market survey, and developed strategic positioning recommendations to keep the City's compensation plan competitive.



Salary Survey Update City of Orlando, Florida

Evergreen was retained again by the City of Orlando to conduct a Salary Survey Update for fire positions. Evergreen used the same targets and positions used for the original salary survey conducted in 2016 and collected the following additional information:

- Do they provide a supplement for paramedic or EMT?
- Is an EMT a minimum requirement for firefighters?
- What is their hourly schedule?
- Do they have a step plan?
- Do they move a step and the plan min and max each year?
- What do they do when a fire staff member is maxed out?



Compensation Consulting City of Orlando, Florida

Evergreen was again retained by the City of Orlando to provide compensation consulting services. Evergreen analyzed the current labor market trends in the Orlando metro area, including the pay increases being offered by Disney between now and 2020; collected information from public entities in the Orlando metro area regarding how they were responding to turnover and talent shortages; examined best practices on implementing wage floors to



address local market changes; proposed several alternatives to the City to address local market changes, especially those related to the increase in the minimum wage to \$15 per hour by some private organizations; worked with the City HR staff to model and cost different implementation scenarios; and provided a short summary of the analysis and recommendations.



Job Classification and Compensation Study City of Melbourne, Florida

Evergreen Solutions was retained by the City of Melbourne to conduct a Job Classification and Compensation Study. Evergreen reviewed the City's salary and benefit structure and assist in updating information on essential job functions, responsibilities, required knowledge, skills and abilities, and physical demands of each position. Evergreen examined all job descriptions to include a review of position FLSA designations; essential functions; minimum qualifications, license requirements, working conditions, etc., provided recommended updates and/or changes, established criterion for the selection of survey participants with City staff members, prepared a survey to send to the participants, and prepared recommendations based on the results.

Evergreen addressed compression/equity issues between pay grades and classifications and established an equitable classification methodology and salary ranges to provide for the recruitment and retention of qualified staff as well as the equitable relationships of one job to another within the organization. Recommendations were provided to classify/reclassify positions as appropriate. In addition, a recommendation was made for a new compensation plan that is fair and equitable in order to attract, motivate, and retain a quality workforce. Evergreen provided three (3) separate proposed pay plan structures based on salary scales that are 90%, 100% and 110% of the surveyed labor market.



Compensation Study City of Hollywood, Florida

The City Hollywood retained Evergreen to conduct a compensation study of all non-represented employees (Executive; Managerial; Legal; Technical; and Confidential Administrative Support). A job-task analysis/job audit was conducted to determine whether classifications were correctly placed in the organizational hierarchy and whether individual job positions were classified correctly. Evergreen reviewed job descriptions using the Job Assessment Tool job valuation methodology and conducted a statistical assessment of current conditions to ensure compliance with federal and state laws including proper designation of classifications as "exempt" vs. "non-exempt". Evergreen conducted a comprehensive survey to ensure that the City of Hollywood's compensation plan was equitable and competitive in its total compensation package relative to internal factors and external markets (The City's goal was to be in the top 25% in salary). Evergreen's consultants



reviewed existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed, based upon the results of the salary survey and the recommended pay plan.

Evergreen concluded the study with recommendations designed to alleviate any strains on the current compensation and classification system. Evergreen further recommended procedures, policies, and methods to maintain an on-going Classification & Compensations Plan that was performance based, fair and competitive. In addition, Evergreen's consultants developed policies and procedures for developing and maintaining a career track/progression/retention program and reviewed existing performance appraisal system in order to make recommendations to integrate the performance appraisal system with new Classification & Compensation Plan. **Note:** At the conclusion of the study Evergreen was hired again to conduct a compensation study of all AFSCME employees (i.e., Professional and Supervisory employees).



Compensation, Classification, and Performance Management Study - Manatee County, Florida

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement.



Compensation and Classification Study Services Monroe County, Florida

Evergreen was retained by Monroe County to conduct a Compensation and Classification Study for 265 non-union employees in 178 classifications as well as 124 union employees in 46 classifications who are represented by the Teamsters bargaining unit. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Evergreen's consultants compared the County's positions to other similar positions within other County departments to determine the relative value of each position to every other position in the County. Comparisons were made with regard to the actual work being performed and based on the current job description. In addition, positions were compared to other similar positions in other private and public sector organizations throughout the Florida Keys and South Florida. Characteristics such as size of the organization, geographic proximity, economic and budget characteristics, and other appropriate demographic data were taken into consideration when making comparisons. Evergreen's consultants also analyzed pay ranges in the public and private sector to determine the appropriate pay and benefit levels for all included jobs.

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

Note: Evergreen was again retained in 2018 to conduct an update of the County's Classification and Compensation Plan to include fire and rescue.



Classification and Compensation Study Alachua County, Florida

Evergreen Solutions was engaged with Alachua County to conduct a Compensation and Classification Study of jobs under the Board of County Commissioners, the Sheriff, Tax Collector, Property Appraiser, Supervisor of Elections, and the Library District. Specifically, the County desired the following services to be performed by Evergreen:

- develop and administer a job analysis questionnaire for the purpose of having employees state their job duties and qualifications including education, experience, licenses and certificates; working conditions (physical and environmental) and all other pertinent information;
- prepare and present to the Board of County Commissioners a report documenting the results of the job analysis by classification and recommendations concerning a classification structure and pay adjustments;



-
- allocate each employee with regard to the new classification structure;
 - identify benchmark classifications to be used to determine appropriate markets for salary survey purposes, as well as to determine the position of the county with regard to salaries for comparable jobs in appropriate markets;
 - administer a salary survey for the purpose of recommending appropriate salaries based on external (market) and internal (equity) considerations;
 - recommend a salary structure, including the number of pay grades, and pay ranges;
 - recommend salaries for each classification, as well as recommended salaries for each employee;
 - provide a classification maintenance plan;
 - provide guidelines and procedures for administering the resulting classification plan to include the following: Initial placement in the salary range and means for movement through the range; and
 - train HR and departmental staff on the methodology and maintenance of the recommended classification and pay plan.



Classification and Compensation Study Palm Beach County, Florida

Evergreen Solutions was retained by Palm Beach County to conduct a Classification and Compensation Study in order to update the current classification and compensation structure. Evergreen performed the following tasks:

- conducted a job analysis across the County to ensure job descriptions matched the duties performed by the employee;
- provided an analysis of all positions— assigning an appropriate salary grade to ensure fairness and equity—and included recommendations for all positions that were found to be above or below the assigned salary grade; and
- conducted a market compensation analysis of salaries and wages of like or similar jobs of comparable Florida public organizations with similar position and organizational characteristics.



Classification and Compensation Study Pinellas County, Florida

Evergreen Solutions was retained by Pinellas County to conduct a comprehensive classification and compensation study that included recommendations and suggestions for an implementation and maintenance process that effectively provided the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study was to have a credible classification and compensation plan that: allowed positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills and abilities to be classified appropriately; identified salaries for assigned duties; outlined promotional opportunities and possible compensation growth; identified pay differential between individual classifications; and identified relevant labor markets.



Classification and Compensation Study Sedgwick County, Kansas

Evergreen Solutions was retained by Sedgwick County to conduct classification and compensation study for approximately 2,766 employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs.

Recommendations were provided to improve the fairness and equity within the County and a plan was provided to address maintenance of implemented changes to the County's classification and compensation system. In addition, Evergreen provided County staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system would be accomplished.



Classification and Compensation Study and Analysis City of Broken Arrow, Oklahoma

Evergreen Solutions was retained by the City of Broken Arrow to conduct a Classification and Compensation Study and Analysis to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. Evergreen performed the following: reviewed all current job classifications, confirmed and recommended changes to hierarchical order of jobs using The City's evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers); identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation matrix and/or structure to meet the market analysis; and assessed potential impact of pending DOL changes.



Comprehensive Classification and Compensation Study City of Branson, Missouri

The City of Branson hired Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to determine whether the City possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Branson.



Compensation Study City of Lee's Summit, Missouri

The City of Lee's Summit retained Evergreen Solutions to conduct a Compensation Study to determine whether the City possessed a compensation and classification system that was equitable as compared to both the external competitive employment market as well as being internally equitable. The study included a complete classification analysis using the Job Assessment Tool and Management Issues Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including both benefits and salary surveys of competing organizations.



The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing systems in place at the City of Lee's Summit. Also included in this study was an evaluation of the City's performance evaluation system to include recommendations for improvement, revision of evaluation instruments and development of a brief training manual for the program.



Classification and Compensation Study Jackson County, Missouri

Evergreen is retained by Jackson County to conduct a classification and compensation study. Evergreen will perform a job and analysis to ensure employee's duties and responsibilities are accurate. Our team will update job descriptions. In addition, Evergreen will study the County's compensation structure, and provide recommendations to optimize the attraction and retention of employees. Evergreen will prepare a report with findings and recommendations.



Comprehensive Compensation and Classification Study Jefferson County, Missouri

Jefferson County retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to analyze the County's market competitiveness and internal equity. Located just 40 miles southwest of the City of St. Louis, the County possessed a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments required special effort. With this in mind, this study included a comprehensive classification analysis using the Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County.



Classification and Compensation Study St. Charles County, Missouri

Evergreen Solutions was engaged with the St. Charles County Government to conduct a Classification and Compensation Study. The primary purpose of the study was to assist the County in the evaluation of its overall employee compensation and pay structure as compared to the market; to perform a job audit and analysis for each full-time position to determine appropriate classification; and to update/develop job descriptions in a standardized format that is ADA and FLSA compliant.

At the conclusion of the study, Evergreen provided a recommended job evaluation plan that will allow the County to evaluate positions every two years as well as provided an administration manual with plan maintenance procedures and a summary document that could be used to communicate the compensation system change to current and future employees.



Classification, Compensation, and Benefits Study Ogden City Corporation, Utah

Evergreen Solutions was engaged with Ogden City Corporation to conduct a Classification, Compensation and Benefits Study. The goals of this study were to ensure that job descriptions accurately reflected actual duties and maintained compensation levels that were both internally and externally equitable.

Evergreen Solutions worked with Ogden City Corporation throughout four project phases that involved:

- conducting a job analysis, including building a classification plan;
- documenting a compensation philosophy;
- reviewing and analyzing the City's total compensation plan, including a market salary and benefits survey; and
- providing a comprehensive report containing recommendations, an implementation approach, and guidelines for maintaining classification and compensation policy updates and changes.



Pay for Performance Study and Salary Survey City of Manitou Springs, Colorado

Evergreen Solutions was retained by the City of Manitou Springs to develop a performance-based pay structure and conduct a salary survey. Evergreen made recommendations regarding enhancements needed to the City's current performance evaluation system and provided the City with a performance evaluation tool.



Classification and Compensation Study Ouray County, Colorado

Evergreen Solutions was engaged with Ouray County to conduct a Classification and Compensation study, including wages and benefits, for full-time and part-time employees of Ouray County. A job analysis was conducted using existing job descriptions to determine the best classifications for the work performed. Evergreen recommended the deletion of outdated or unnecessary jobs descriptions as well as the revision to current positions, if needed. In addition, a salary survey was conducted to ensure external market equity by comparing Ouray County to other county governments, local municipalities and local businesses as appropriate. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.



Classification and Compensation Study City of Seguin, Texas

Evergreen Solutions was hired to assist the City of Seguin in designing and implementing a comprehensive classification and compensation plan for its workforce of 330 full-time employees. The scope of the project included two major components: (1) Working with a City management team to revise the existing pay plan and structures; and (2) Evaluating current salary structure and compensation levels for all regular, classified positions and recommending appropriate adjustments.

Specifically, Evergreen's consultants reviewed the City's current classification/compensation plan; surveyed management and identified problem areas regarding the classification and compensation system; conducted a salary survey to ensure external equity; reviewed current policies and procedures; reviewed salary structure to determine appropriateness; and provided technical assistance and training to City staff to facilitate the implementation and the maintenance of the recommended system and procedures.



Comprehensive Compensation and Benefits Study City of Sachse, Texas

Evergreen Solutions was hired by the City of Sachse to conduct a Comprehensive Compensation and Benefits Study. The study measured and provided an analysis on base salary, pay/step plans, employer-provided medical benefits packages and any other incentive-based compensation options, including "on call" pay. To ensure the project's validity and applicability, Evergreen conducted a compensation analysis using similar-sized local municipalities for comparison and recommended comparator cities for consideration.

The following study components were compared:



- pay ranges with comparator cities performing the same or similar functions;
- actual employee pay with comparator cities performing the same or similar functions;
- pay/step plans/special assignment pay with comparator cities performing the same or similar functions; and
- city-provided comprehensive employee benefits packages with comparator cities performing the same or similar functions.

Evergreen recommended pay structure features that provided opportunities for advancement while minimizing salary overlap between levels of responsibility.



Classification and Compensation Study City of Pflugerville, Texas

Evergreen Solutions was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman).

Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost analysis for positions that would require adjustments.

Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1st and 3rd quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval.



Comprehensive Compensation and Benefits Study City of Rowlett, Texas

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include "on call" pay. Evergreen's consultants identified any weaknesses within the components of the City's existing compensation package that would negatively impact the organization's ability to attract and retain talented employees.



Pay Structure Study City of Fate, Texas

Evergreen was hired to develop a new pay plan for the City of Fate. Evergreen performed the following tasks: reviewed the City's salary data; created a new pay plan for the City; slotted current jobs into the new pay plan; and verified the internal equity of the new pay plan.



Job Classification, Salary Survey, Compensation Plan Study Services City of Duncanville, Texas

Evergreen Solutions was engaged with the City of Duncanville to provide professional Job Classification, Salary Survey, and Compensation Pay Plan Study Services that allowed the creation of a comprehensive job classification and compensation system and pay plans for employees within the City. Evergreen's consultants reviewed and analyzed the City's current structure and practices of job classifications and job descriptions including: conducting orientation sessions; providing questionnaires; conducting management and employee interviews; reviewing questionnaire responses with supervisory and management staff; performing a job analysis; and developing and/or revising job descriptions.

Evergreen prepared a customized market survey of salaries of the local and area municipalities that included all of the competitive markets where the city recruited employees. Evergreen established a system for an ongoing and easily understood maintenance of the new, or updated, pay plan that was easy for employees to understand and for managers to administer. The recommended pay plan effectively balanced market and internal equity, supported the classification system, and promoted an employee's perception of organizational fairness and equity in the City.



A Classification and Compensation Pay Plan City of Amarillo, Texas

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan for 2,200 employees. Evergreen's consultants: reviewed the City's existing classification/compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade.

In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.



Comprehensive Classification and Compensation Study City of Farmers Branch, Texas

Evergreen Solutions was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive.



Comprehensive Compensation Plan City of Padre Island, Texas

Evergreen Solutions is retained by the City of South Padre Island to design and implement a comprehensive compensation plan for the City of South Padre Island that includes a pay for performance component. The scope of this project includes:

- work with an assigned committee to determine specific needs related to the City in regards to compensation;
- work with the committee to review and establish benchmark cities to be used in determining the City's "competitive market";
- conduct a job analysis to establish pay grades/classification groups for all City positions;



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- review current compensation philosophy, policies and plan and work with assigned committee to determine City's compensation philosophy;
 - conduct a customized market salary and benefit analysis for all full-time positions that includes additional pay types (i.e. assignment pay, certification pay, education pay, etc.);
 - recommend and identify a competitive position within the market (i.e. percentile of market);
 - recommend pay structures (grades/classification groups and pay ranges;
 - develop a complete, market-sustainable compensation plan that includes a pay for performance structure that rewards those employees with high performance;
 - coordinate with the City to illustrate initial (single) and/or multi-year implementation cost scenarios;
 - meet with the assigned committee and prepare and present to City Council, as required;
 - create and provide administrative policies related detailing the complete compensation plan for insertion into the Employee Handbook; and
 - provide comprehensive training for key City staff members for implementation and ongoing maintenance of the approved compensation plan.



**Employee Compensation Consulting Services
Fort Bend County, Texas**

Evergreen was retained by Fort Bend County to provide employee compensation consulting services. Evergreen conducted the following tasks:

- reviewed current compensation plan including policy groups and salary structures;
- conducted Fair Labor Standards Act (FLSA) exempt/non-exempt status review of all positions;
- analyzed internal equity and possible compression issues;
- completed salary survey of City and County governments in the State of Texas as designated by the County;



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- designed and executed a salary survey, analyzed results and made recommendations; and
 - evaluated and determined each employee's proper step placement on the newly approved salary grade structure.



Compensation and Classification Study Brazoria County, Texas

Evergreen was retained by the Brazoria County to conduct a Compensation and Classification Study. Evergreen developed a compensation program for the County, evaluated current pay grades, and developed a classification system to facilitate the ongoing compensation analysis. Evergreen assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen also developed multiple alternative recommendations and a communication plan.



Compensation Study City of Carlsbad, New Mexico

Evergreen Solutions was retained by the City of Carlsbad to conduct a Compensation Study. The study included evaluating 50 administrative positions and three elected official positions as benchmarks against the private and public labor market in the State of New Mexico, and making recommendations to improve competitiveness in alignment with the City's strategic goals. Evergreen's recommendations improved the City's competitiveness and helped prepare it for future recruitment challenges.



Comprehensive Compensation and Classification Study City of Santa Fe, New Mexico

Evergreen Solutions was engaged by the City of Santa Fe to conduct a comprehensive compensation and classification study for all City 1,326 employees, including non-bargaining employees and those covered by collective bargaining agreements. Evergreen conducted orientations and focus groups with general employees, and interviewed department directors and other executive managers. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations as needed for revisions to the current classification structure.



Evergreen also worked with City Human Resources staff to conduct a comprehensive salary survey. The results were combined with the internal hierarchy analysis to generate recommendations for a comprehensive compensation and classification structure. Evergreen provided detailed recommendations for the implementation of a new structure and related employee salary adjustments. Evergreen also assisted the City with implementation of a revised performance assessment system which include training with supervisors and staff, and creating and distributing performance appraisal factor weighting forms.



**Compensation Study
City of Hobbs, New Mexico**

Evergreen was retained by the City of Hobbs to conduct a Compensation Study. Evergreen identified appropriate benchmarking standards and conducted a total compensation survey with comparable municipalities and private sector employers, when applicable. Evergreen conducted an external labor market benefit survey. Evergreen reviewed the total compensation system, identified potential pay compression issues and/or inequities (both internally and to the market), and provided recommendations.



**Classification Study and Compensation Survey
City of Page, Arizona**

Evergreen Solutions was engaged with the City of Page to conduct a Classification Study and a Compensation Survey for all employees. As part of the study, Evergreen conducted orientation sessions, focus groups, and interviews. Employees completed a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A salary and benefits survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures were recommended to the City.



**Compensation Study
City of Flagstaff, Arizona**

City of Flagstaff has hired Evergreen Solutions to conduct a Compensation Study. Evergreen Solutions' consultants will:

- evaluate the current broadband pay plan structure;
- evaluate the current skill-based pay plan, public safety, and general 2080 pay plan structures;



-
- conduct a market salary survey of at least five other local government and private sector peer organizations;
 - develop a plan for the City's strategic improvement, including the identification of highly competitive positions within the City; and
 - develop recommendations and guidelines for the continued administration and maintenance of the compensation system.

Note: This project is nearing completion.



Classification and Compensation Study City of Prescott, Arizona

The City of Prescott has retained Evergreen Solutions to conduct a Classification and Compensation Study, including the development of a compensation philosophy, to design and implement a comprehensive total compensation plan and to classify all positions appropriately within the plan structure. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including salary and benefits surveys of competing organizations. The final report culminated in a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Prescott.



Compensation Study Town of Sahuarita, Arizona

Evergreen Solutions was hired by the Town of Sahuarita to conduct a Compensation Study that is in alignment with the Town's Strategic Management Plan. Evergreen assisted the Town in developing a highly competitive pay philosophy to recruit and retain quality professional staff and surveyed the market to identify proper pay ranges in the public and private sector for similar classifications.



Classification and Compensation and Equal Pay Study City of Albany, Oregon

Evergreen Solutions was retained by the City of Albany to conduct a Classification and Compensation and Equal Pay Study. Evergreen's consultants reviewed current job descriptions and compensation structures to determine the need for modifications to assure external competitiveness and internal equity by performing the following tasks:



reviewed current job descriptions to analyze knowledge, ability, education, experience, relevance, and hierarchical consistency;

- developed, distributed, and analyzed job specific questionnaires, as needed, and conducted in-person interviews of select staff to complete analysis;
- proposed, where appropriate, broad-banding of classifications, or combining classifications into a series, if beneficial to achieve alignment of similar positions;
- recommended additions, deletions, or modifications to existing classifications and made FLSA determinations (exempt or non-exempt status) for positions;
- surveyed comparator jurisdictions for both wages and total compensation;
- analyzed results and developed appropriate pay structures for City taking into account compression and internal equity;
- conducted equal pay analyses of recommended pay structures that complied with House Bill (HB) 2005 and its implementing administrative rules; and
- trained City HR staff on the methodology used to assess job classifications in order to maintain internal equity when adding, deleting, or modifying jobs in the future.



Compensation and Classification Study and Equal Pay Analysis Columbia County, Oregon

Evergreen Solutions was retained by Columbia County to conduct a Compensation and Classification Study. Evergreen Solutions worked with the Compensation Study Committee (CoSC) to develop a compensation system for the County, evaluated current pay grades, conducted an equal pay analysis in compliance with the Oregon Equal Pay Law, and developed a classification system to facilitate the continued administration of the compensation analysis. Evergreen's consultants assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen's consultants will then developed multiple alternative recommendations and a communication plan. Finally, Evergreen reviewed and developed different policies procedures and proposed different recommendations.



1.3 Proposed Project Team

Total Compensation Study Spokane County, Washington

Evergreen Solutions was retained by Spokane County to conduct a Total Compensation Study. Evergreen reviewed total Compensation (compensation and benefits) for 1,950 regular, full-time employees in 225 positions and recommended possible wage adjustments that align with the County's compensation philosophy. Additionally, Evergreen compared the County's benefits package with those offered in the same local market identified in the pay analysis.



Classification Study Spokane County, Washington

Evergreen Solutions again retained again by Spokane County to conduct a Classification Study. Evergreen will conduct a job analysis to determine internal equity and will provide recommendations regarding the appropriate classification structure. Evergreen will review and revise job descriptions and make FLSA determinations.

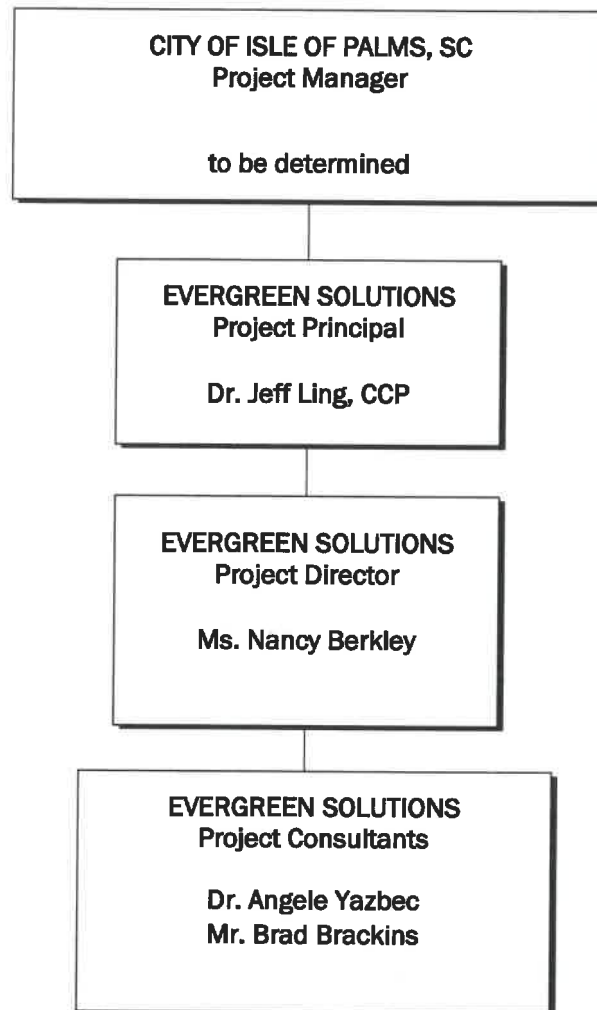


In this section we provide you with the qualifications of our proposed project team. Detailed resumes are available upon request.

Exhibit 1-2 reflects our proposed project management and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Wage and Compensation Analysis so that there will be no confusion as to who is responsible for any aspect of this engagement with the City of Isle of Palms.



**Exhibit 1-2
Proposed Project
Management
Organization and
Personnel
Assignments**



City of Isle of Palms Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The City's Project Manager (CPM) will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the CPM and all project deliverables will be filtered through the CPM throughout the duration of the project.

Evergreen Solutions' Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, typically the President. The Project Principal will have contractual authority over the contract, and will be our top level of project responsibility.

Evergreen Solutions' Project Director. Evergreen Solutions designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the City. The Project Director will have the most frequent contact with the City and will assign project activities to the Project Consultants, and will ensure that deliverables are met within specified timelines.



Evergreen Solutions' Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will, conduct orientation sessions, interviews, and focus groups, administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT), review pay plans, collect the data for the salary and benefits survey, review and revise job descriptions, and prepare draft and final reports.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Our firm is proposing an exceptional team of consultants who have worked together on many similar projects. We always make sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Wage and Compensation Analysis for the City of Isle of Palms.

Key Personnel

The following paragraphs provide summaries of each team member's qualifications and experience related to his/her role in this engagement.

Project Principal Dr. Jeff Ling, CCP

Dr. Jeff Ling is the President of Evergreen Solutions and has been with the firm since its inception. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector Evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include:



- **Compensation/Classification** – He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note:** He has served as the Project Principal for more than 600 Classification and/or Compensation studies for public sector clients.
- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.

**Project Director
Ms. Nancy Berkley**

Ms. Nancy Berkley is the Vice-President of Evergreen Solutions who has been with the firm more than seven years. She has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Ms. Berkley possesses expertise in the following HR areas:



- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.
- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and tools—including total revision and communication of a company’s HR policies and practices to be in accordance with state and federal laws;
- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Some of the public sector projects that Ms. Berkley has directed or served on the Evergreen Team include: a Classification and Compensation Study for Berkeley County, SC; Classification and Compensation Study Services for Beaufort County, SC; a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, SC; a Pay and Classification Study for the Town of Moncks Corner, SC; a Classification and Compensation Study for the Town of Hilton Head Island, SC; an Employee Evaluation System for the North Charleston Sewer District, SC; a Classification and Compensation Study for the City of Goose Creek, SC; a Classification and Compensation Study for the Richland Library, SC; Classification and Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; a Classification and Compensation Study for Gloucester County, VA; a Compensation Study for King George County, VA; a Pay and Classification Study for the Isle of Wight County, VA; a Classification and Compensation Study for Essex County, VA; a Compensation and Classification Study for Montgomery County, VA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Personnel Policy and Salary Study for Northumberland County, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Classification and Compensation Study for Blount County, TN; a Comprehensive Classification and Compensation Study for Carter County, TN; Classification and Compensation Study Services for the City of Urbana, IL; a Compensation and Classification Study for the Central Ohio Transit Authority; a Compensation Update for the Central Ohio Transit Authority; a Classification and Compensation study for Transylvania County, NC; a Salary Equity Study for



Guilford County, NC; a Position Classification and Compensation Study for Gaston County, NC; a Pay and Classification Study for Buncombe County, NC; a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, NC; a Classification Study and a Compensation Survey for the City of Page, AZ; a Classification and Compensation Study for the Town of Little Elm, TX; a Human Resources Department Assessment for the City of Buda, TX; a Market Salary Update for the City of Buda, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Classification and Compensation Study for the City of Conroe, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Classification and Compensation Study for the City of Portland, TX; a Comprehensive Compensation and Benefits Study for the City of Rowlett, TX; a Compensation Plan Study for the City of South Padre Island, TX; a Classification and Compensation Study for the City of Lockhart, TX; a Salary Compensation Study for Hood County, TX; a Compensation and Classification Study for Brazoria County, TX; a Classification and Compensation Study for Sedgwick County, KS; a Classification and Compensation Study for Jefferson County, MO; Classification and Compensation/Benefits Study for the City of Jacksonville Beach, FL; a Salary Survey for the City of Dania Beach, FL; a Classification, Compensation, and Benefits Study for the Town of Jupiter, FL; a Classification and Compensation Study for the Town of Cutler Bay, FL; a Comprehensive Compensation and Classification Study for the City of Panama City, FL; a Comprehensive Compensation and Classification Study for the City of Panama City Beach, FL; a Compensation Plan Update for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Destin, FL; a Compensation and Classification Study for Alachua County, FL; Job Audits for the City of Gainesville, FL; a Pay and Classification Study for the City of Fort Walton Beach, FL; a Compensation and Classification Study for the City of North Port, FL; a Compensation Study for the Village of North Palm Beach, FL; a Compensation Study for the City of Hollywood, FL; a Compensation Study for Lake County, FL; a Pay and Classification Study for Martin County, FL; a Performance Evaluation Study for Lake County, FL; a Compensation and Classification Study for Highlands County, FL; Compensation and Classification Study Services for Monroe County, FL; a Classification and Compensation Study for the City of New Smyrna Beach, FL; a Compensation Study for the a Compensation and Benefits Study and Analysis for the City of Dahlonaga, GA; a Comprehensive Position Classification and Compensation/Benefits Study and Analysis for the City of Woodstock, GA; a Compensation Analysis for the City of Alpharetta, GA; Employee Classification and Compensation Study for the City of Savannah, GA; Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Compensation and Classification Study for the City of Brookhaven, GA; a Comprehensive Compensation and Classification Study for the City of Tybee Island, GA; a Pay and Classification Study for the City of Chamblee, GA; a Compensation Study for the City of Dalton, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Wages and Salaries Compensation Study the City of Stockbridge, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Salary Survey for the City of Dunwoody, GA; a Compensation Study for the City of Statesboro; a Salary and



**Project Consultant
Dr. Angele Yazbec**

Benefits Survey for the City of Roswell, GA; a Classification and Compensation Study for the City of Commerce, GA; a Compensation and Benefits Survey for Forsyth County, GA; a Compensation Market Study and Survey for Forsyth County, GA; a Compensation Study for the Forsyth County Public Library, GA; a Pay and Classification Study for Worth County, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, GA; and a Classification and Compensation Study for Lumpkin County, GA.

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University.

Dr. Angele Yazbec is a Consultant with Evergreen who has been with the firm more than two years. She possesses a Ph.D. in Cognitive Psychology from Florida State University, and has a strong background in quantitative and qualitative analysis. She is able to apply her knowledge and skills as a Consultant for Evergreen through various functions including: conducting market research and collecting compensation data, running regression analyses and recommending appropriate pay grades, and editing job descriptions.

Recent Projects that Dr. Yazbec has been involved with include: a Classification and Compensation Study for the Town of Hilton Head Island, SC; Classification and Compensation Study Services for Beaufort County, SC; a Classification System and Pay Plan Development Study for Franklin County, NC; a Compensation and Classification Study for the City of Goldsboro, NC; a Compensation and Classification Study for Transylvania County, NC; a Classification and Compensation Study for the Alliance Health, NC; a Compensation and Classification Study for Charles County Government, MD; a Compensation Study for the City of Hagerstown, MD; Personnel Manual Review and Revision Services for Calvert County, MD; a Personnel Policy and Salary Study for Northumberland County, VA; a Compensation Survey for the Susquehanna River Basin Commission, PA; a Non-Union Compensation Study for Boston Public Health Commission, MA; a Classification and Compensation Study for Shawnee Community College, IL; a Classification and Compensation/Benefits Study for the City of Jacksonville Beach, FL; a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, FL; a Compensation study for the City of Orlando, FL; a Comprehensive Compensation Study for the Florida Bar, FL; a Pay Plan Study for Southwest Florida Water Management District, FL; a 360 Degree Review for the City of Groveland, FL; a Classification and Compensation Study for the City of New Smyrna Beach, FL; a Compensation and Classification Study for the Town of Surfside, FL; a Salary Review for the City of Brookhaven, GA; a Compensation and Benefits Study and Analysis for the City of Woodstock, GA; a Compensation Study for the City of Dalton, GA; a Comprehensive Compensation and Classification Study of the City of Forest Park, GA; a Pay Study and Analysis for the City of Duluth, GA; a Salary Survey for the City of Dunwoody, GA; a Pay and Class Study for the City of Roswell, GA; a Comprehensive Employee Comp Study Plan for the City of Tybee Island, GA; a Compensation Study for the Forsyth County Public Library, GA; a Classification, Pay and Benefits Study for Lee County Commission, AL; a



**Project Consultant
Mr. Brad Brackins**

Compensation Study for the Auburn-Opelika Tourism Bureau, AL; a Compensation and Classification Study for Columbia County, OR (She served as the Project Director); a Classification and Compensation Study for the City of Portland, TX; a Compensation and Classification Study for Brazoria County, TX; a Classification and Compensation Study for Kaufman County, TX; a Salary Compensation Study for Hood County, TX; a Classification and Compensation Study for the City of Lockhart, TX; a Compensation Plan Study for the City of South Padre Island, TX; and a Classification and Compensation Study for Santa Fe Community College, NM.

Mr. Brad Brackins is a Consultant at Evergreen Solutions who has been with the firm more than three years. With his background in data analysis and public administration, he assists public organizations in navigating the unique human resources challenges that they face today.

Mr. Brackins experience at Evergreen Solutions includes conducting compensation and classification studies. He works closely with organizations to gather employee feedback and organizational data in order to evaluate their current situation. He also conducts market studies in order to evaluate competitiveness with peer organizations. Through his research and analytical skills, he is able to use this information to formulate customized solutions that help public sector clients improve their ability to recruit and retain high-quality employees.

A sample of some of the recent public sector projects that Mr. Brackins has been involved with include: a Classification and Compensation Study for Rock Hill Schools, SC; a Compensation Study for Horry County Government, SC; an Emergency Medical Services Salary Study for Spartanburg County, SC; an Employee Evaluation System for the North Charleston Sewer District, SC; a Pay and Classification Study for Buncombe County, NC; a Compensation and Classification Study for Union County, NC; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Personnel Policy and Salary Study for Northumberland County, VA; a Classification and Compensation Study for Shenandoah County, VA; a Classification and Compensation Study Services for the City of Westminster, MD; a Classification and Compensation Study for Blount County, TN; Classification and Compensation Study Services for the City of Urbana, IL; a Classification Study for Jefferson Community College, NY; a Classification and/or Compensation Study for Orange County Community College, NY; a Compensation and Classification Study for SUNY Erie Community College, NY; Human Resources Consulting Services to the Redevelopment Authority for the County of Butler, PA; a Total Compensation Study for Spokane County, WA; a Classification Study for Spokane County, WA; a Salary Survey for the City of Lakeway, TX; a Salary Survey for the City of Carlsbad, NM; a Compensation Study for the City of Flagstaff, AZ; a Compensation and Classification Study for Jackson County 16th Judicial Circuit Court, MO; a Compensation Study Services for Jackson County, MO; a Classification and Compensation Study for Jefferson County, MO; a Compensation Plan Survey for Northwest Florida Beaches International Airport, FL; a Compensation Study for Monroe County School District, FL; a Compensation and Classification Study for the Broward County Housing Authority, FL; an Update



to Salary Structure for CareerSource NE Florida; a Compensation Study for the City of Alachua, FL; a Compensation Study for the Florida Virtual School; a Compensation Study for the Town of Lady Lake, FL; a Job Classification and Compensation Study for the City of Parkland, FL; a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, FL; a Pay and Classification Study for the Town of Lake Park, FL; a Salary Study for the City of Holmes Beach, FL; a Job Classification and Compensation Study for the City of Parkland, FL; a Compensation and Benefits Study for Cherokee County, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Pay and Classification Study for the City of Fayetteville, GA; and a Compensation and Pay Classification Plan Study for the City of Foley, AL.

Mr. Brackins has a Master's Degree in Public Administration from Florida State University and Bachelor of Art's Degree in Business Administration from the University of Florida.



Note: A team of experienced analytical and clerical support staff will contribute to this study, as needed.



Section 2

Project Plan



2.0 *Project Plan*

In this section we provide our overall approach and methodology for conducting the Wage and Compensation Analysis for the City of Isle of Palms and a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of work of the Request for Proposals—and a proposed work schedule. We also include the content of our work product.

2.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Wage and Compensation Analysis for the City of Isle of Palms as our team includes recognized experts in local government human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization's compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the City's designated Project Manager and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your need to meet your performance goals while carefully managing the organization's resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.

Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management



	<p>must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.</p> <p>Evergreen realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.</p> <p>Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.</p>
Kick Off Meeting	<p>Evergreen begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:</p> <ul style="list-style-type: none"> • finalizing the project work plan; • identifying milestone and deliverable dates; • gaining insight into the management structure and approach; • collecting classification, compensation and benefits data; • identifying additional data needs; and • developing preliminary schedules for subsequent tasks. <p>At this time, we will also request a copy of the employee database that reflects current classification and compensation data.</p>
Communication Plan	<p>Communication is a critical component of any Wage and Compensation Analysis. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. The results of these meetings are then communicated to employees during the project outreach through employee orientation sessions, focus groups, and interviews. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.</p>
Employee Orientation and Focus Groups	<p>Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.</p>



**Department Head
Interviews**

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question and answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

**Job Assessment
Tool and
Management
Issue Tool**

Another important activity undertaken at this time is the distribution of Evergreen's Job Assessment Tool© (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee's job that captures the nature of the job and how it interacts with work within the organization.

The JAT contains questions that ask about each of the following areas:

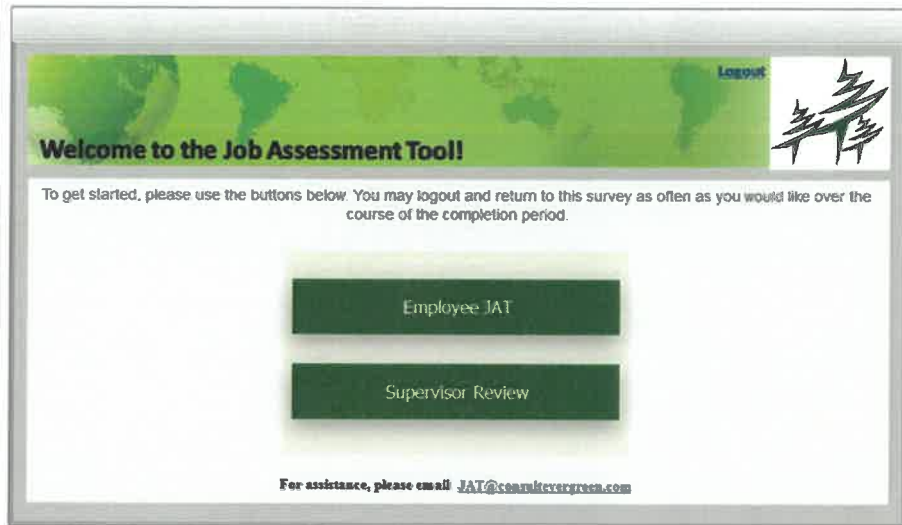
- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

Evergreen will contact the client's Project Manager should there be a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically. If requested, we can also provide a paper-based version of the tool.

Exhibit 2-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.



Exhibit 2-1 Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2019

Exhibit 2-2 illustrates how Evergreen uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



Exhibit 2-2 Job Description and Responsibilities

Basic Job-Related Information

Logout

Job Introduction

Briefly provide an overview of your job, including a description of the purpose of your job and the type of work you do. This may be the same as the introduction to your current job description, but it does not need to be.

Description

2000

Type of Work

Please select the level that best describes the type of work you perform

Type of Work

- ☐ Clerical/Support - Perform a variety of office and administrative support duties OR unskilled, labor-intensive tasks
- ☐ Laborer/Trade-Based Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy
- ☐ Technician/Paraprofessionals - Performs tasks requiring a solid understanding of basic algebra and statistics OR use of heavy equipment
- ☐ Administrator - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance
- ☐ Managers/Professionals - Performs tasks requiring advanced knowledge which is predominantly intellectual in nature. OR tasks related to the control or administration of part of the organization
- ☐ Executive/Advanced Professionals - Performs tasks related to managing the organization, or managing a department OR perform work requiring highly advanced knowledge

Education and Experience

Please select the level that best describes how much education and experience a new-hire should be required to have for your position

Education -Select One-

Experience -Select One-

Licenses and Certifications

Please list any licenses, certifications, or professional designations you believe should be required or preferred for your position

Required

250

SAVE

Source: Evergreen Solutions, 2019

Exhibit 2-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.



Exhibit 2-3 Job Functions

Essential Job Functions

On the lines provided, please include all essential job functions you perform. For every function you list, estimate the total percent of your time spent on each function on an annual basis and check off which tasks are a priority. A priority task is one that is core to your position.

Task	Percent	Priority
Task 1	100	<input type="checkbox"/>
Task 2	100	<input type="checkbox"/>
Task 3	100	<input type="checkbox"/>
Task 4	100	<input type="checkbox"/>
Task 5	100	<input type="checkbox"/>
Task 6	100	<input type="checkbox"/>
Task 7	100	<input type="checkbox"/>
Task 8	100	<input type="checkbox"/>
Task 9	100	<input type="checkbox"/>
Task 10	100	<input type="checkbox"/>

Source: Evergreen Solutions, 2018

In addition to the JAT, Evergreen will also distribute our Management Issues Tool (MIT). The MIT is distributed to supervisors and managers and is used to collect specific information from supervisors and managers related to such issues as recruitment and retention problems, classification issues, pay equity issues, problems with titles, and other related issues. Each MIT will be logged and a specific response will be provided. The MIT process is designed to allow supervisors and managers to give direct input into the process and they serve as “red flags” to Evergreen staff during the analysis portion of the project.

Preliminary Assessment

As a starting point for analysis, Evergreen's project consultants review the client's database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses



	<p>on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity, compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.</p>
Job Evaluation	<p>The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen's consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen's consultants will work directly with the Client Project Manager to resolve any issues.</p> <p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
Compensation	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p> <p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.</p>
Market and Benefits Survey	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p> <p>In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary.</p>



Benchmarks One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

Unifying the Solution After determining the appropriate division of work and market position, the compensation structure can be created. There is not a single, perfect solution for every client partner. The nuances and unique characteristics of each client necessitate a customized solution to best meet the organization's needs.



Compensation Administration Guidelines

The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.

It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen's consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.

In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;
- how often to adjust pay scales and survey the market;
- timing of implementation; and
- how to keep the system fair and competitive over time.

System Maintenance

Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

Based on client needs and industry best practices, Evergreen has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay



plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, **JobForce Manager** allows our clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit 2-4 displays the interface from **JobForce Manager** for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

Exhibit 2-4
JobForce Manager Tool

Pay Plans		Scoring/Slotting		Compensation		Market		Account		
<div><div>Download Data</div><div>Grid Edit</div></div>										
CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)	GRADE	MINIMUM	MIDPOINT	MAXIMUM	
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.68	106	\$22,702.21	\$31,508.68	\$40,315.17	Edit
Accounting Specialist III	ESP	231.3	\$38,008.27	\$39,379.43	\$40,213.96	110	\$28,974.42	\$40,213.96	\$51,453.51	Edit
Accounting Specialist IV	ESP	306.3	\$42,315.73	\$40,166.80	\$44,235.90	112	\$31,944.29	\$44,235.90	\$56,727.50	Edit
Accounting Supervisor	ESP	500.0	\$67,561.02	\$68,350.91	\$68,779.53	121	\$49,596.06	\$68,779.53	\$88,002.97	Edit
Acquisition Specialist	ESP	306.3	\$42,315.73	\$41,595.60	\$44,235.90	112	\$31,944.29	\$44,235.90	\$56,727.50	Edit
Administrative Aide	ESP	312.5	\$43,190.08	\$36,624.74	\$44,235.90	112	\$31,944.29	\$44,235.90	\$56,727.50	Edit
Administrative Recording Secretary	Professional	381.3	\$92,088.10	\$40,994.30	\$58,245.16	212	\$46,596.13	\$58,245.16	\$69,894.19	Edit
Administrative School Secretary I	ESP	206.3	\$29,285.91	\$31,619.17	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,390.93	Edit
Administrative School Secretary II	ESP	231.3	\$32,543.36	\$35,996.59	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	Edit
Administrative School Secretary III	ESP	256.3	\$35,800.82	\$37,701.80	\$38,299.01	109	\$27,594.68	\$38,299.01	\$49,003.35	Edit
Administrative Secretary I	ESP	231.3	\$32,543.36	\$32,190.02	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,390.93	Edit
Administrative Secretary I	ESP	206.3	\$29,285.91	\$32,190.02	\$33,084.13	106	\$23,837.32	\$33,084.13	\$42,390.93	Edit
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	Edit
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33	107	\$25,029.19	\$34,738.33	\$44,447.48	Edit
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,971.01	\$38,299.01	109	\$27,594.68	\$38,299.01	\$49,003.35	Edit
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,762.63	\$38,422.62	204	\$31,538.06	\$39,422.62	\$47,907.14	Edit
Administrative Specialist-School Food Services	Professional	275.0	\$38,243.91	\$42,861.08	\$45,636.61	207	\$36,509.29	\$45,636.61	\$54,763.93	Edit

Source: Evergreen Solutions, 2019



2.2 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Compensation and market Study for the City of Isle of Palms (City) is provided in this section. Evergreen understands that there are 91 full-time employees who will be included in the study.

Our work plan consists of the following 11 work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data
- Task 4: Evaluate and Build Projected Classification Plan
- Task 5: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 6: Conduct Market and Benefits Survey and Provide External Assessment Summary
- Task 7: Develop Strategic Positioning Recommendations
- Task 8: Conduct Solution Analysis
- Task 9: Develop and Submit Draft and Final Reports
- Task 10: Develop Recommendations for Compensation Administration
- Task 11: Provide Revised Class Descriptions and FLSA Determinations

Task 1.0 Project Initiation

TASK GOALS

- Finalize the project plan with the City.
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

- 1.1 Discuss with the City's Project Manager (CPM) and any other key personnel the following objectives:
- the classification and pay plan study process;
 - understand mission and current compensation philosophy;
 - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
 - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
 - establish an agreeable communication schedule.



Task 2.0
Evaluate the
Current System

- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the City and some of the short- and long-term priorities. This activity serves as the basis for assessing where the City is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials from the City, including:
 - any previous projects, research, evaluations, or other studies that may be relevant to this project;
 - organizational charts for the departments and divisions, along with related responsibility descriptions;
 - current position and classification descriptions, salary schedule(s), benefits plans, and classification system; and
 - personnel policies and procedures, including step placement policies.
- 1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.
- 1.5 Provide status updates to the CPM throughout the course of the study.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of City staff

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation plan(s) for the City.

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s) and structure for the City. Discuss any pay compression issues that may exist and possible resolutions.
- 2.3 Complete an assessment of 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.



**Task 3.0
Collect and Review
Current
Environment Data**

KEY PROJECT MILESTONES

- Review of existing compensation plan(s)
- Initial compensation philosophy
- Assessment of current conditions

TASK GOALS

- Conduct statistical and anecdotal research into the current environment within the City.
- Guide subsequent analytical tasks.

TASK ACTIVITIES

- 3.1 Schedule and conduct employee orientation sessions to describe the scope of work and methodology.
- 3.2 Interview department heads/supervisors, to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the CPM to administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT). Our staff utilizes a web-based tool for data collection. Paper copies can be provided for classifications without computers or Internet access.
- 3.5 Review any data provided by the City that may provide additional relevant insight.

KEY PROJECT MILESTONES

- JAT and MIT distribution
- Department head/supervisor interviews
- Employee focus groups and orientation sessions

**Task 4.0
Evaluate and Build
Projected
Classification Plan**

TASK GOALS

- Identify the classification of existing positions utilizing Evergreen's job evaluation system.
- Review JAT responses.



**Task 5.0
Identify List of
Market Survey
Benchmarks and
Approved List of
Targets**

- Characterize internal equity relationships within the City.

TASK ACTIVITIES

- 4.1 Review all draft class specifications with the CPM.
- 4.2 Review the work performed by each classification and score. Include an evaluation of supervisory comments.
- 4.3 Review JAT scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.
- 4.5 Develop preliminary recommendations for the classification structure. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Review recommendations with the CPM.

KEY PROJECT MILESTONES

- JAT scores by class
- Recommended classification changes
- Preliminary job structure based on internal equity

TASK GOALS

- Reach an appropriate number and identify the proper benchmark positions for the external labor market salary assessment.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market salary assessment.

TASK ACTIVITIES

- 5.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will use all of the City's 39 job titles as benchmarks for the salary survey.
- 5.2 Finalize the list of positions with the CPM.



**Task 6.0
Conduct Market
and Benefits
Survey and
Provide External
Assessment
Summary**

- 5.3 For each employee group review with the CPM the peer organizations to use as targets for the salary and benefits survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary and benefits survey.
- 5.4 Develop a preliminary list of public and private organizations for the external labor market survey of salary and benefits, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the Isle of Palms area;
 - economic and budget characteristics; and
 - other demographic data.
- 5.5 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 5.6 Review survey methodology with the CPM and refine survey methodology prior to distribution of survey.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

- Final list of benchmark positions for the external labor market assessment salary survey
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

TASK GOALS

- Conduct the external labor market salary survey.
- Conduct a benefits survey.
- Provide a summary of the salary and benefits survey results to the CPM.

TASK ACTIVITIES

- 6.1 Prepare a customized external labor market salary survey for the CPM's approval. Discuss questions and categories for the market survey.



Task 7.0
Develop Strategic
Positioning
Recommendations

- 6.2 Develop a listing of the current benefits provided by the City.
- 6.3 Using the list of City provided benefits and major benefits offerings not provided by City develop a list of benefits to include in the external labor market benefits survey.
- 6.4 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 6.5 Submit the benefits survey to the CPM for review.
- 6.6 Distribute benefits survey in conjunction with salary survey.
- 6.7 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.8 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 6.9 Validate all data submitted.
- 6.10 Develop summary report of external labor market salary and benefits assessment results.
- 6.11 Submit summary report of external labor market salary and benefits assessment results to the CPM.

KEY PROJECT MILESTONES

- Market survey instrument
- Benefits survey instrument
- Summary report of external labor market salary and benefits assessment results

TASK GOALS

- Assess the appropriateness of the current compensation philosophy for the City.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 7.1 Identify the compensation philosophy and accompanying thresholds.
- 7.2 Using the market salary and benefits survey data collected in **Tasks 6.0**, and the classification data reviewed in **Task 4.0**, determine the proper pay plans for the City.



**Task 8.0
Conduct Solution
Analysis**

- 7.3 Identify highly competitive positions within the City and customize recommendations for compensation where required.
- 7.4 Develop strategies for the recruitment and retention of employees.
- 7.5 Produce a pay plan(s) for the City that best meets its needs from an internal equity and external equity standpoint.

KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account internal and external equity
- Plan for addressing unique, highly competitive positions

TASK GOALS

- Conduct analysis comparing JAT values.
- Survey results for the benchmark positions.
- Produce several possible solutions for implementation.

TASK ACTIVITIES

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the City.
- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
- 8.3 Create implementation solutions for consideration that take into account the current position of the City as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
- 8.4 Meet with the CPM to discuss the potential solutions.
- 8.5 Determine the best solution to meet the needs of the City in the short-term and long-term.
- 8.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential solutions
- Documented final solution



**Task 9.0
Develop and
Submit Draft and
Final Reports**

TASK GOALS

- Develop and submit a draft and Final Report of the Wage and Compensation Analysis to the City of Isle of Palms.
- Present the Final Report.

TASK ACTIVITIES

- 9.1 Produce a comprehensive draft report that captures the results of each previous step. Provide a draft final report to the CPM for review and approval. The draft final report will include the costs associated with all recommendations as well as an implementation plan based on the recommended changes to the classification and compensation plans.
- 9.2 Make edits and submit necessary copies of the Final Report to the CPM.
- 9.3 Present the Final Report to the City.
- 9.4 Develop a communication plan for sharing study results with employees of the City.
- 9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

**Task 10.0
Develop
Recommendations
for Compensation
Administration**

TASK GOALS

- Develop recommendations for continued administration by City staff to sustain the recommended compensation and classification system.
- Provide training.

TASK ACTIVITIES

- 10.1 Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system by City staff, including recommendations and guidelines related to:
 - how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;



- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;
- 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.

10.2 Recommend recruitment/retention strategies, where appropriate.

10.3 Present recommendations to the CPM for review.

10.4 Finalize recommendations.

10.5 Provide training to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's **JobForce Manager** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies
- Training on Evergreen's **JobForce Manager** tool

Task 11.0 Provide Revised Class Descriptions and FLSA Determinations

TASK GOALS

- Update existing class descriptions.
- Create new class descriptions as needed, ensuring ADA, FLSA, EEO, etc. requirement satisfaction.
- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

TASK ACTIVITIES

11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.



- 11.2 Discuss new class description format with the CPM and the Director of Human Resources.
- 11.3 Revise classification descriptions based on data gathered from the JAT process.
- 11.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.
- 11.5 Make FLSA determinations based on work performed and federal requirements.
- 11.6 Recommend a systematic, regular process for reviewing job descriptions.

KEY PROJECT MILESTONES

- Updated class descriptions
- New class descriptions, as needed
- FLSA Determinations

2.3 Proposed Work Schedule

Evergreen possesses the ability, staff, skills, and tools to conduct the Wage and Compensation Analysis for the City of Isle of Palms in 3.5 months of the project start date and following the signing of the contract. This is based on a tentative start date of December 1, 2020, and a completion date of March 15, 2020.

This proposed work schedule can be modified in any way to best meet the needs of the City of Isle of Palms.

2.4 Content of Work Product

Evergreen Solutions typically includes the following five chapters in a final report for a Wage and Compensation Analysis:

- **Chapter 1: Introduction** - This chapter provides an introduction into the study and describes the necessary steps that will take place. The major deliverables include a revised project plan, timeline, outreach protocols, document questions, and weekly update reports.
- **Chapter 2: Summary of Outreach** - This chapter provides a summary of any employee meetings and department head interviews. The major deliverables include a summary of outreach results and potential issues for further investigation.
- **Chapter 3: Assessment of Current Conditions** - This chapter provides an overall assessment of the structure of the compensation plan in place in the College and a brief analysis of the employee demographics. The major deliverables include career path analysis, range and rank



compression analysis, strengths and weaknesses of the current system, and initial findings.

- **Chapter 4: Market Summary** - This chapter provides results of the market salary and benefits surveys that were distributed to peer organizations. The major deliverables include a summary of market peers, proposed benchmark jobs, peer surveys, extrapolation file for benchmarks to other jobs, and market results by classification.
- **Chapter 5: Solution** - This chapter summarizes the proposed recommendations based on the findings from the previous chapters. The recommendations generally include four different categories: *Classification, Overall Structure, Compensation, and Administration*. The major deliverables include report, policy recommendations, and implementation plans.

In addition to the final report, Evergreen will provide a solution file that will include a cost breakdown and implementation strategy for all recommended options for the City in updating its classification and compensation structure. Evergreen will also provide updated and/or new job descriptions in electronic format.

Evergreen will also provide training using its own **JobForce Manager** software that will allow the City to facilitate the implementation and ongoing maintenance of the recommended changes to its classification and compensation system. The City will have access to this software free of charge at the conclusion of the study.



Section 3

References



3.0 References

In this section, we provide the following three references that we feel demonstrate our experience as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

Employee Compensation and Pay Classification Study

City of Conway, South Carolina

Contact Information: Lynn Smith, Human Resources Director, 1000 2nd Avenue: PO Drawer 1075, Conway, South Carolina, 29528 (843) 488-7635, lsmith@cityofconway.com

Years worked with: 2018



Classification and Compensation Study

City of Lancaster, South Carolina

Contact Information: Angela Roberson, Human Resources Director, 216 South Catawba Street Lancaster, South Carolina 29721, (803) 289-1456, aroberson@lancastercitysc.com

Note: Evergreen also previously worked for the City on a similar study.

Years worked with: 2012 and 2018



Classification and Compensation Study Services

Beaufort County, South Carolina

Contact Information: Amanda Kincaid, Interim HR Director, P.O. Drawer 1228, Beaufort, South Carolina 29901-1228, (937) 206-1737 (cell), amanda.kincaid@bcgov.net

Years worked with: 2019 to present



Section 4

Detailed Cost Proposal



4.0 *Detailed Cost Proposal*

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Wage and Compensation Analysis for the City of Isle of Palms. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 2** of our proposal is **\$21,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two separate onsite visits to the City of Isle of Palms, if necessary, to perform the requested work.

Our preferred payment schedule is as follows:

- 33% - upon completion of Tasks 1 – 2
- 33% - upon completion of Tasks 3 – 5
- 34% - upon completion of Tasks 6 – 11

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the City of Isle of Palms wishes to identify.





CONDREY &
ASSOCIATES, INC.

A Human Resources Consulting Company

October 28, 2020

Ms. Desiree Fragoso
City Administrator
City of Isle of Palms
1207 Palm Boulevard
Isle of Palms, South Carolina 29451

Dear Ms. Fragoso:

I have enclosed a proposal to conduct a classification, compensation and benefits study for the City of Isle of Palms. If selected, we plan to begin work on the project December 1, 2020, with a preliminary report submitted for review in March 2021 and a final report submitted on or before March 31, 2021. The enclosed proposal outlines a thorough study for the City.

I believe you will agree that confidence is built in a new classification and compensation system by involving management and employees in the process. If selected for this project, we would interview approximately 95% of the City's 91 full-time employees covered under this letter of agreement. We believe this high percentage of persons individually interviewed for the study will greatly increase its validity. As you will note from the enclosed proposal, in the employee interview process we utilize a variety of skilled consultants with specific subject matter knowledge of local government administration, public safety, public utilities, public finance, public works and information technology. This process leads to a valid and expertly prepared compensation plan that is accepted by the City's employees.

Condrey and Associates is incorporated in the State of Georgia. We have been serving clients nationwide for more than 22 years and have never been involved in any litigation. I strongly encourage you to check the references we have listed in our proposal packet. I believe you will find that we work very hard to deliver a thoroughly documented and competitive personnel system that meets the needs of management and employees alike.

This offer of services is valid until March 31, 2021. We will be happy to revise the enclosed memorandum of agreement to meet appropriate legal requirements as deemed necessary by the City of Isle of Palms or to enter into an appropriate contract initiated by the City.

We are looking forward to providing high quality human resource management consulting services to the City of Isle of Palms. I believe you will find our firm to be highly competent and responsive to the needs of your jurisdiction. Please contact me at (706) 380-7107 if I may provide further information.

Sincerely,

Steve Condrey, Ph.D.
President

**PROPOSAL FOR A CLASSIFICATION,
COMPENSATION AND BENEFITS
STUDY FOR THE CITY OF
ISLE OF PALMS, SOUTH CAROLINA**

October 28, 2020

**Condrey and Associates, Inc.
PO Box 7907
Athens, Georgia 30604-7907
(706) 380-7107 (phone)
(586) 816-4067 (fax)
steve@condrey-consulting.com
www.condrey-consulting.com**

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PROFILE OF PROPOSER

Condrey and Associates, Inc. is a human resource management consulting firm providing personnel-related technical assistance to local and state government organizations. All work performed for the City of Isle of Palms project will be conducted on site and at the firm's offices in Athens, Georgia.

The two principals associated with the project, Dr. Steve Condrey and Ms. Jan Hansford, have collaborated on over 500 similar projects for state and local governments. Consultants for this project will be chosen from among consultants with specific subject matter knowledge in local government, public safety, public utilities, public health, and public works administration: Mr. Mark Knowles, an independent consultant experienced in financial administration and information technology, Dr. Rex Facer, Associate Professor in the Romney Institute of Public Management at Brigham Young University and a skilled human resources consultant, Gene Mays, former Chief Deputy of the Athens-Clarke County, Georgia, Sheriff's Department and a skilled law enforcement consultant, Mr. James Hansford, a skilled classification consultant and former Executive Director of the Georgia Firefighter Standards and Training Commission, Mr. Mike Mahathirath, a skilled consultant specializing in IT, Finance and Staffing Analyses, Dr. Mark Foster, an industrial psychologist with extensive experience in law enforcement administration, Dr. James M. Austin, Jr., an industrial psychologist and President of Austin Consulting, Inc., Mr. Brian Burke, a certified Real Estate Appraiser and Firefighter, and Dr. Greg Reece, a skilled technical writer and consultant.

REPRESENTATIVE CLIENT CONTACTS

Listed below are five representative references. Additional professional references are available upon request.

Ms. Debbie Hardin
Human Resources Manager
Town of Fort Mill
200 Tom Hall Street
Fort Mill, South Carolina 29715
(803) 547-2116
dhardin@fortmillsc.gov

We completed a comprehensive classification and compensation study for the Town of Fort Mill in 2019 (approximately 200 employees).

Ms. Sandra Padgett, County Director
Ms. Joni Drafts, Financial and Human Resources Coordinator
Saluda County Government
400 West Highland Street
Saluda, South Carolina 29138
(864) 445-4500, ext. 2227
j.drafts@saludacounty.sc.gov

We completed a comprehensive classification and compensation study for Saluda County in 2018 (approximately 180 employees).

Mr. Steve North
Assistant City Manager
City of Lawrenceville
70 S. Clayton Street
Lawrenceville, GA 30046
(770) 963-2414
steve.north@lawrencevillegaweb.org

We completed a comprehensive classification and compensation study for the City of Lawrenceville in 2017 (approximately 300 employees). We completed an update of Lawrenceville's personnel system in 2020.

Ms. Heather Doke, PHR
Human Resources Director
City of Sheridan
55 Grinnell Plaza
Sheridan, WY 82801
(307) 675-4220
hdoke@sheridanwy.net

We completed a comprehensive classification and compensation study for the City of Sheridan in 2005 (approximately 200 employees). We completed updates of their system in 2013 and 2018.

Ms. Lisa Thrash
Human Resources Director
City of Prattville
101 West Main Street
Prattville, Alabama 36067
(334) 595-0701
lisa.thrash@prattvilleal.gov

We completed a comprehensive classification and compensation study for the City of Prattville in 2018 (approximately 400 employees).

SELECTED CLIENTS

Alabama

Alabama Department of Postsecondary Education
Alabama Department of Corrections
Alabama Department of Human Resources Head Start
Anniston Water Works and Sewer Board
City of Anniston
City of Auburn
Curry Water Authority
City of Dothan
Dothan-Houston County Intellectual Disabilities Board
City of Eufaula
Eufaula Water & Sewer Board
Etowah County
Town of Falkville
City of Gadsden
City of Jasper
Jasper Water Works and Sewer Board
Lee County
City of Madison
City of Mobile
Mobile County
Mobile County Personnel Board
Mobile Area Water and Sewer Board
Mobile Housing Authority
North Central Alabama Regional Council of Governments (NARCOG)
City of Opelika
City of Prattville
City of Rainbow City
City of Tallahassee
City of Tuscaloosa
Selma Waterworks and Sewer Board
Walker County

Alaska

Matanuska-Susitna Borough

Arkansas

City of Jonesboro
City of North Little Rock

Connecticut

Town of Waterford

Florida

City of Miami Beach
City of Panama City Beach
St. Johns County
St. Johns County Property Appraiser
St. Johns County Clerk of Courts

Georgia

City of Acworth
Ben Hill County
Brunswick-Glynn County Joint Water and Sewer Commission
City of Canton
City of Cartersville
Columbus Consolidated Government
Cook County
Coweta County Water and Sewerage Authority
City of Forest Park
City of Hinesville
City of Holly Springs
City of Lawrenceville
City of Suwanee
Lowndes County
Morgan County
Paulding County
City of Peachtree City
Pickens County
City of Statesboro
Tift County
Troup County
City of Tybee Island
United Methodist Church, North Georgia Conference
City of Valdosta
City of Watkinsville

Kentucky

Bowling Green Municipal Utilities
DESA International, Inc., Bowling Green
City of Morganfield

Illinois

Village of Forsyth
City of Moline

Iowa

Dallas County
Muscatine Power and Water

Iowa, Continued

City of Pella

Maine

City of Scarborough

Maryland

City of Takoma Park

Missouri

City of Cape Girardeau

City of Gladstone

City of Jefferson City

City of Lake Saint Louis

City of O'Fallon

City of Sedalia

Nevada

Carson City School District

City of Boulder City

New Hampshire

Local Government Center

City of Concord

Town of Hanover

Manchester Employees' Contributory Retirement System

New Mexico

Bloomfield School District

Deming Public School System

Santa Fe Community College

San Juan College

New York

Madison County Government

Onondaga County Government

Orange County Government

North Carolina

Braswell Memorial Library, Rocky Mount

Cape Fear Public Utility Authority

Town of Chapel Hill

City of Hickory

City of Laurinburg

Lenoir County

City of Lincolnton

North Carolina, Continued

Lincoln County Government
North Carolina League of Municipalities
Orange County Government
City of Rocky Mount
Rutherford County Government
City of Wilson

North Dakota

City of Bismarck
City of Mandan
Mandan Parks District

Oklahoma

City of Broken Arrow
Northeastern State University

South Carolina

Town of Fort Mill
City of Goose Creek
Jasper County Government
McCormick County
Saluda County

South Dakota

City of Aberdeen
City of Pierre
Minnehaha County
Pennington County
City of Madison
City of Mitchell
City of Rapid City
City of Spearfish

Tennessee

City of Hendersonville

Texas

City of Big Spring
City of Beaumont
City of Forney
City of Galveston
City of Rockport
City of Seabrook
Galveston County Government
Galveston County Health District

Texas, Continued

Harris County Housing Authority
Oller Engineering, Inc., Lubbock
Texas Municipal League Intergovernmental Risk Pool
Webb County Government

Vermont

Town of Hartford
Town of Norwich

Virginia

The Children's Center
City of Franklin
Franklin Development and Housing Authority
Powhatan County
Town of Rocky Mount
Town of Vinton

Washington

City of Moses Lake

Wyoming

City of Casper
City of Cody
City of Evanston
Evanston Parks & Recreation District
City of Gillette
City of Green River
City of Laramie
City of Rock Springs
City of Sheridan
Sheridan County Government
Sheridan Recreation District

SUMMARY OF PROPOSER'S QUALIFICATIONS

Stephen E. Condrey, Ph.D. Steve Condrey, President of Condrey and Associates, has over thirty years of professional experience in human resource management and has consulted nationally and internationally with over 800 organizations concerning personnel-related issues. He is the immediate past Editor-in-Chief of the *Review of Public Personnel Administration* and is the co-editor of *Public Administration in Post-Communist Countries* (CRC Press, 2013), editor of the *Handbook of Human Resource Management in Government*, Jossey-Bass, (1998, 2005 and 2010), and *Radical Reform of the Civil Service*, Lexington Press, 2001. He is the 1998 recipient of the University of Georgia's Walter Barnard Hill Award for Distinguished Achievement in Public Service and Outreach and was named Hill Fellow by the University of Georgia in 2004 (the University of Georgia's highest public service faculty honor). He holds the IPMA-SCP designation from the International Public Management Association for Human Resources. Steve retired from the Carl Vinson Institute of Government, University of Georgia in 2010. He was appointed by President Obama as Chairman of the Federal Salary Council in 2010 and served in this capacity until 2017. Dr. Condrey was elected as a Fellow to the National Academy of Public Administration in 2012 and was President of the American Society for Public Administration for 2013-2014.

Ms. Jan Hansford. Jan Hansford, Vice President of Condrey and Associates, is a Principal Human Resource Management Consultant with the Vinson Institute and recently retired as Human Resources Director of Athens-Clarke County, Georgia, a consolidated government of over 1600 employees. With over 30 years of related experience, both as a practitioner and as a consultant, Jan specializes in administrative classification issues, *Fair Labor Standards Act* compliance, and payroll restructuring and administration. She is also well-versed in communicating complex classification and compensation issues in a clear and understandable fashion and will assist in communicating study results to department heads, elected officials, and employees. Ms. Hansford has assisted in managing over 400 personnel-related projects. Jan holds the IPMA-SCP designation from the International Public Management Association for Human Resources.

Mr. Mark Knowles. Mark Knowles, Principal Consultant with Condrey and Associates, is the founder of GovDirections.com – a leading online procurement monitoring system. Mark has prior experience with the Georgia Municipal Association, where he provided technical assistance to local governments. Mark has assisted with organizational management issues related to technology in several communities including the cities of Rapid City, South Dakota, and Auburn, Alabama. Mark has experience in performance benchmarking and assisted in the design and implementation of systems in communities such as Lowndes County and Dawson County, Georgia. Mark has over twenty years of classification and compensation experience and has assisted managing projects in over 200 jurisdictions across the United States.

Mr. Gene Mays. Gene Mays, Senior Consultant with Condrey and Associates, has over twenty-five years of law enforcement experience as a Patrol Officer, Corporal, Juvenile Officer, Detective, Sergeant, Internal Affairs Officer, and Captain with the Athens-Clarke County Police Department. He recently retired as Chief Deputy of the Clarke County, Georgia Sheriff Department. In addition to directly-related law enforcement experience, Gene is a skilled law

enforcement consultant, having consulted with numerous jurisdictions concerning personnel-related issues (classification and compensation, job analysis, and assessment centers). Gene coordinated the law enforcement interviews with the City of Anniston, Alabama, Orange County, North Carolina, Jefferson City, Missouri, North Little Rock and Jonesboro, Arkansas, Galveston County, Texas, Wilson, North Carolina, Auburn, Alabama, Cape Girardeau, Missouri, Sheridan, Wyoming, Gladstone, Missouri and Jasper, Alabama projects.

Mr. James E. Hansford. Jim Hansford, Principal Consultant with Condrey and Associates, has over thirty-five years of experience as a Firefighter, Lieutenant, Captain, Chief of Training and Fire Chief of a consolidated government fire department. He recently retired as the Executive Director of the State of Georgia Firefighter Standards and Training Council, where he administered the certification program for all fire departments in the State of Georgia. Jimmy is a member of the International Association of Fire Chiefs, Georgia Association of Fire Chiefs, and the Georgia Firefighters Association. Mr. Hansford is a skilled consultant, having assisted with over 100 personnel-related projects in various jurisdictions.

Mr. Mike Mahathirath. Mike Mahathirath, Senior Consultant with Condrey and Associates, is co-founder of GovDirections – the leading online procurement monitoring service. Mike has prior experience with the Georgia Municipal Association and the Georgia Department of Community Affairs. Mike managed one of the largest lease-purchase pools in the United States and implementation of a statewide uniform chart of accounts for Georgia Local Governments. Mike has over twelve years of experience working with local governments throughout the United States.

Mr. Ellis Cadenhead. Ellis Cadenhead, Senior Consultant with Condrey and Associates, recently retired as Executive Director of the Coweta County (Georgia) Water Authority. Ellis previously served as Executive Director of Electric Cities of Georgia and Assistant General Manager of Newnan Utilities (Georgia), a full-service utilities commission. Ellis is active in various state and national professional organizations. He assisted with the Galveston, Texas, North Little Rock, Arkansas, Bowling Green Municipal Utilities (Kentucky), Wilson, North Carolina and Muscatine Power and Water (Iowa) projects. Ellis was the founder of the Georgia Public Web, as well as numerous telecommunications innovations while with Newnan Utilities.

Dr. Rex Facer. Rex L. Facer II, Senior Consultant with Condrey and Associates, is an Associate Professor in the Romney Institute of Public Management in the Marriott School at Brigham Young University where he teaches in the Master of Public Administration program. President Obama appointed Facer to the Federal Salary Council in 2010. Facer previously served on NASPAA's Commission on Peer Review and Accreditation, including a term as chair. The commission is the accrediting body for master's degree programs in public administration. Professor Facer regularly lectures and consults nationally and internationally on human resource management and local public finance issues. His published research has appeared in leading peer-reviewed journals. His current research focuses on public sector compensation practices, alternative work schedules, and local government finance. Rex coordinates all performance appraisal design and training as well as all salary equity analyses for Condrey and Associates, Inc.

Dr. James M. Austin, Jr. Jim Austin, Senior Consultant with Condrey and Associates, is President of Austin Consulting, Incorporated. Dr. Austin has extensive experience in conducting job analysis, assessment center preparation/administration, policy development, training, and position classification activities in a variety of public and private sector organizations including Home Depot.

Dr. Mark Foster. Mark Foster, Senior Consultant with Condrey and Associates, is an industrial psychologist with over 20 years of experience in law enforcement personnel selection and promotion administration. Mark has coordinated the promotional process for the Georgia State Patrol for the past twelve years, and the Georgia Bureau of Investigation for the past eight years. Additionally, he has consulted nationally with numerous other law enforcement agencies and with Fortune 500 corporations such as Georgia Pacific and Federal Express.

Dr. Cathy Reese. Cathy Reese, Senior Consultant with Condrey and Associates, is Assistant Professor of Public Administration at Arkansas State University where she teaches courses in budgeting, financial administration, and human resource management. Cathy has over 15 years of experience in conducting classification and compensation studies and most recently worked on the North Little Rock and Jonesboro, Arkansas, projects.

Mr. Brian Burke. Brian Burke, Senior Consultant with Condrey and Associates, is a certified Real Estate Appraiser and Fire Officer. Brian has consulted with over 30 organizations, and currently works for a local government.

Ms. Linda Seagraves. Linda Seagraves, Principal Consultant with Condrey and Associates, is a Personnel Specialist with the Vinson Institute of Government. Ms. Seagraves specializes in payroll restructuring and is skilled in calculating project implementation costs so that accurate budget projections are provided to the client. Ms. Seagraves has consulted with over 500 organizations.

Dr. Greg Reece. Greg Reece, Principal Consultant with Condrey and Associates, is a skilled technical writer, author and consultant. He holds graduate degrees from Vanderbilt University (M.Div.) and Claremont Graduate University (Ph.D). He teaches courses in Ethics at the University of Alabama, Birmingham.

FLORIDA SURVEY RESEARCH CENTER PROFILE

Michael J. Scicchitano, Ph.D. Michael J. Scicchitano is an associate professor of political science and the director of the Florida Survey Research Center (FSRC) at the University of Florida. As Director of the FSRC he has implemented hundreds of survey research and program evaluation projects in the past ten years including projects related to housing and real estate. He has extensive knowledge of the implementation of telephone, mail, and in-person surveys. He brings expertise in survey design, sampling, and data analysis to this project. Dr. Scicchitano earned a BA in political science and masters in public administration from Pennsylvania State University. He received his Ph.D. in political science from the University of Georgia in 1984. Since 1984 he has been on the faculty at West Virginia University, the University of Connecticut and the University of Florida. In addition to his work with the FSRC, he is director of the masters program in public administration. He is also editor of *State and Local Government Review*, which is the official journal for American Society for Public Administration's section on intergovernmental management. His research on issues related to public policy and public affairs has been published in *Journal of Politics*, *Publius*, *Legislative Studies Quarterly*, *Policy Studies Journal*, *Administration and Society* and many others. He has taught courses on public budgeting, computer applications, and public policy and administration to graduate and undergraduate students at the University of Florida.

Tracy L. Johns, Ph.D. Tracy Johns is an Adjunct Instructor for the Departments of Sociology and Political Science and the Research Director at the Florida Survey Research Center (FSRC) at the University of Florida. As Research Director of the FSRC, she has designed and overseen the implementation of hundreds of surveys. Dr. Johns is responsible for the creation and design of survey instruments, population sampling, managing survey implementation, supervising data analysis, and writing summary reports of research conducted by the FSRC. She has an extensive background in conducting mail, telephone, and in-person surveys as well as secondary data analysis and program evaluations. Dr. Johns earned a B.A. and M.A. in sociology from the University of Florida, and completed her Ph.D. in sociology at the University of Florida in 2001.

Dr. Johns has published, in journals such as *Journal of Research in Crime and Delinquency* and *Security Journal*, and presented papers on a variety of topics, including: crime and deviance on college campuses, disaggregated homicide results, racism in America, and survey methodology. Dr. Johns' research focuses on issues related to alcohol use and abuse, date rape, and white collar crime. She has initiated and overseen several large-scale studies on alcohol and drug use and she is currently studying shoplifting behaviors. Dr. Johns teaches courses in deviant behavior and general sociology at the University of Florida.

SUMMARY OF CONSULTANT RESPONSIBILITIES AND ASSIGNMENTS

Steve Condrey will serve as project director and will coordinate all direct contacts with the client in conjunction with **Jan Hansford**. Jan will also coordinate the classification interview schedule, personally interview top administrative personnel, be responsible for constructing the overall classification plan, direct the salary survey, calculate project implementation costs, review the proposed classification plan with appropriate City officials, conduct employee classification appeals (if any), and be available on an as-needed basis for follow-up technical assistance and training during the first year of project implementation.

Jan Hansford and Mark Knowles will serve as assistant project directors and will assist Steve Condrey in the above outlined duties. Mark will also conduct the classification interviews in conjunction with Jan Hansford.

Dr. Greg Reece is the writer for the project. **Linda Seagraves** will coordinate salary data collection activities conducted by the University of Florida as part of this project and will calculate the costs of various project implementation plans.

City of Isle of Palms staff support required for the project will be minimal. We request that one person be appointed to serve as our principal contact for the purpose of communicating project plans and schedules, gathering current payroll information, and disseminating and collecting position questionnaires and draft job descriptions.

PROJECT UNDERSTANDING, PROPOSED APPROACH, AND METHODOLOGY

- * For a full description of project activities please see the enclosed draft contract. Individual employees will be apprised of project activities through a series of project orientation sessions as well as personally during the time that they are interviewed for classification purposes.
- * Condrey and Associates will conduct a salary survey specifically for this project. Approximately 25 organizations will be invited to participate in the survey. The salary data will be collected using a university-based online system. This system makes it easy for the target organizations to quickly and accurately input their salary and, if needed, benefit information. Each organization will be sent an email that explains the online salary system as well as access information. The team implementing the online salary survey is available to answer questions and provide support as needed. A sample of the web-based salary data collection system can be viewed at : <http://www.flsurveyresearch.org/demo/> using the access code: NJFRHP
- * We will provide the City of Isle of Palms with three implementation plans showing the relative impact of differing funding levels on the compensation plan. This will provide the City with a degree of flexibility in implementing the project. Back-up data will provide individual employee salary calculations for placement in the new plan. Additionally, Condrey and Associates will discern the need for and, if necessary, detail the cost of any equity adjustment to ease employee pay compression.
- * Three months following project implementation, Condrey and Associates will conduct an employee appeals process. The appeals process will provide employees an opportunity to provide written justification for appealing their classification. Condrey and Associates will reply to all appeals in writing and will conduct telephone or onsite reviews to ascertain the nature of the appeals. We normally have few (if any) classification appeals.
- * Condrey and Associates utilizes a modified version of the Factor Evaluation System (FES). FES is the most widely utilized point-factor evaluation system and is the basis for most all other point-factor job evaluation systems. We have utilized FES in over 500 organizations of differing functions and degrees of administrative sophistication. We find that FES, when applied skillfully and properly, produces an internally equitable classification plan that is highly acceptable to management as well as the organization's employees. Training in FES application will be provided to the City of Isle of Palms human resources staff. Also, we provide a full year of follow-up technical assistance to include additional training to insure that the system is properly maintained. Please note that all FES data calculations are available in electronic format. Also, since FES is in the public domain, there are no copyright or royalty fees associated with its use.
- * We will conduct extensive interviews or desk audits with full-time position incumbents (approximately 95% of the City's 91 full-time employees). This will help assure an accurate and internally equitable classification plan that is accepted by management as well as the City's employees.

* Condrey and Associates utilizes a system of career ladders as an overlay to the classification system developed through our job evaluation system. These career ladders provide avenues for managerial flexibility as well as individual employee incentive and achievement. We believe this methodology is superior to traditional broad-banding and avoids that system's potential flaws, including those related to equal pay.

* Condrey and Associates is very familiar with the *Americans with Disabilities Act* (ADA). In addition to providing advice to clients in the practical application of ADA, one of the firm's principals conducted the most extensive survey to date of ADA implementation in America's cities. Approximately 300 cities responded to the survey. The results appear in the *American Review of Public Administration*.

* All written products produced for the City of Isle of Palms project will become the property of the City. This includes the job evaluation system, position questionnaires, salary survey data, and all training materials. These products will also be provided to the client in disk form. Our current software includes Word, Excel, and the Statistical Package for the Social Sciences (SPSS+). There is no additional charge for this service.

SUMMARY OF THE PROPOSED FEE STRUCTURE

Condrey and Associates will provide the services outlined in the enclosed draft contract for the **fixed cost** of \$29,500 plus \$12,500 if the City chooses to conduct a benefits study. Please note that if your benefits package approaches 38% of payroll, a benefits survey may not be necessary. This fee includes one year of follow-up technical assistance at no additional charge to the jurisdiction.

MEMORANDUM OF AGREEMENT

This agreement is made and entered into this ____ day of _____ 2020, by and between the City of Isle of Palms, party of the first part, hereinafter called the COOPERATOR and Condrey and Associates, Inc., party of the second part, hereinafter called the CONSULTANT. All obligations under this agreement will be performed by Condrey and Associates, Inc.

WITNESSETH, inasmuch as the COOPERATOR is desirous of setting up a cooperative service with Condrey and Associates and inasmuch as the CONSULTANT is willing to undertake and conduct such a cooperative service, the purpose of this agreement is to establish the terms and conditions under which such a cooperative service will be accomplished pursuant to the conditions herein set forth.

The CONSULTANT is an independent contractor. Furthermore, the parties hereto agree that any information gathered from the COOPERATOR or its employees, and the documents prepared therefrom, shall be the property of the COOPERATOR. They shall remain confidential and shall not be used by CONSULTANT other than in its duties and responsibilities hereunder.

NOW, THEREFORE, in consideration of the following mutual promises, covenants, and conditions, it is agreed as follows:

Section I

Condrey and Associates will:

a. Carry on the cooperative service onsite and in the offices of Condrey and Associates substantially as set forth in the attached outline marked "Appendix A" and made a part of this agreement.

b. Preserve all of its records bearing upon the amounts payable under this agreement, and further agrees that any specifically authorized representative of the COOPERATOR shall, until the expiration of one year after final payment under this agreement, have access to and the right to examine any directly pertinent books, documents, papers, and records of Condrey and Associates involving transactions related to this agreement.

Section II

COOPERATOR will pay Condrey and Associates a fixed fee of \$29,500 plus \$12,500 if the City chooses to conduct a benefits survey. This amount will be paid in two (2) equal installments, within twenty (20) days of receipt of billing. The invoices should be directed to Ms. Desiree Fragoso, City Administrator, City of Isle of Palms, 1207 Palm Boulevard, Isle of Palms, South Carolina 29451; telephone number (843) 886-6428. The billings shall occur on December 15, 2020 and March 1, 2021.

Section III

The term of this agreement shall be from December 1, 2020 through March 31, 2021. However, it may be terminated by either party by written notice of such intent submitted 30 days in advance. In the event of such termination, the COOPERATOR will pay Condrey and Associates a prorated portion of the upcoming installment consistent with the revised termination date. Condrey and Associates will continue to work on the project until the revised termination date and will provide to the COOPERATOR interim findings and summary notes that reflect the status of the project at the time of revised termination.

Section IV

This agreement may be modified at any time by mutual consent of the parties hereto.
Any modification hereto shall be in writing and signed by both parties.

Section V

Neither party to this agreement will discriminate against any person, employee or applicant for employment because of race, creed, color, religion, sex, national origin, ancestry, age, veteran status, or disability.

IN WITNESS WHEREOF, this agreement is entered into on the date first above written.

FOR CONDREY AND ASSOCIATES:

FOR THE CITY OF ISLE OF PALMS:

Stephen E. Condrey
President

Date:_____

Date:_____

Jan H. Hansford
Vice President

Date:_____

Corporate Seal

APPENDIX A

Contract for Technical Assistance to the City of Isle of Palms: Proposal for Reviewing and Updating the City's Compensation and Classification System

The administration of the City of Isle of Palms has determined the need for a review and updating of the job classification system and pay plan for selected jobs covered under its personnel system.

Condrey and Associates proposes the following schedule of activities to accomplish four objectives:

1. Review and revise the current personnel classification system and pay plan for all employees covered under this agreement;
2. Produce an updated description of each job and produce a classification system based on job content analysis;
3. Collect salary and benefits data and produce a recommended pay plan based on job analysis, job evaluation, and survey data; and
4. Train designated personnel in each step of classification and pay plan development to help insure the implementation and maintenance of the system.

Phase I – Developing a Work Plan and Schedule of Activities

- 1.1 Condrey and Associates, in cooperation with appropriate officials, will generate a work plan of activities and target dates for completion.
- 1.2 During this phase all the documents detailing the current personnel policies and procedures, job classification system and pay plan will be made available to Condrey and Associates for review and analysis.

Phase II – Job Analysis Survey

- 2.1 Condrey and Associates will develop a detailed job survey form to be completed by position incumbents. This data will serve as the basis for generating updated job descriptions, job classifications, and job evaluations (ranking of jobs).
- 2.2 Condrey and Associates will determine the number of interviews and/or job audits that will need to be conducted to insure adequate data for generating a complete and valid description of each job and job classification. It is anticipated that approximately 95% of

the City's 91 full-time employees will be interviewed concerning their job duties and responsibilities.

- 2.3 After the job survey, job audits and interview data are analyzed, a properly formatted job description will be completed for each job. The written job description will draw on four sources of information: (1) current job descriptions, (2) information from the job survey, (3) supervisors' review and critique, and (4) interviews and job audits.

Phase III – Job Evaluation

- 3.1 Condrey and Associates will furnish a job evaluation format of established procedures for ranking jobs and measuring differences in job content.
- 3.2 Condrey and Associates and appropriate officials will select a format best suited for measuring different levels of knowledge, skills, and abilities required to perform the jobs to be evaluated.

Phase IV – Developing a Compensation Structure

Condrey and Associates will:

- 4.1 Condrey and Associates will conduct a salary and benefits survey of organizations specifically for this project. The survey will include up to 20 organizations and 35 benchmark positions.
- 4.2 Condrey and Associates will collect, review, and format published salary data covering relevant public and private organizations.
- 4.3 Condrey and Associates will analyze and format the survey data for use in establishing competitive pay levels.
- 4.4 After the survey data is compiled, Condrey and Associates will review all data generated to this point with appropriate officials to determine what additional information needs to be considered before moving to the next phase.

Phase V – Developing a Pay Plan

Condrey and Associates will:

- 5.1 Establish recommended pay grades based on the job evaluation results (Phase III) and the wage survey (Phase IV).

- 5.2 Establish pay steps or ranges in each grade and present the complete recommended pay plan to appropriate officials for review. At this point the plan will reflect the data from Phases III and IV as well as cost-of-living data and the jurisdiction's financial condition and compensation policy.

Phase VI – Implementing and Administering the Program

Condrey and Associates will:

- 6.1 Recommend a series of career ladders and lattices as appropriate.
- 6.2 Determine the proper FLSA designation of each position.
- 6.3 Present alternative plans to ameliorate salary compression.
- 6.4 Be available to provide a reasonable level of ongoing technical assistance necessary to maintain the program.

Cost and Duration

The cost to Condrey and Associates to provide the services specified in this proposal will be a **fixed fee** of \$29,500 plus \$12,500 if the City chooses to conduct a benefits survey. Considering the scope of the project, we anticipate a four (4) month work plan beginning December 1, 2020, with final reports submitted on or before March 31, 2021. Follow-up technical assistance will be provided through March 31, 2022 at no additional cost to the City (with the exception of travel-related costs). Formal involvement would terminate March 31, 2021.

City of Isle of Palms
Schedule of Activities

<u>DATE</u>	<u>ACTIVITY</u>
December 2020	<ul style="list-style-type: none">o Conduct project orientation for human resources staff and department headso Distribute position questionnaireso Completed position questionnaires returned to Condrey and Associates
January 2021	<ul style="list-style-type: none">o Conduct employee interviewso Begin salary survey
February 2021	<ul style="list-style-type: none">o Continue salary survey
March 2021	<ul style="list-style-type: none">o Develop preliminary cost estimateo Present preliminary classification and pay reporto Publish final report
April 2021 – March 2022	<ul style="list-style-type: none">o Provide follow-up technical assistance in pay plan implementation.

Project Directors: Dr. Stephen E. Condrey, President
Ms. Jan Hansford, Vice President
Condrey and Associates, Inc.
PO Box 7907
Athens, GA 30604-7907
(706) 380-7107 (Phone)
(586) 816-4067 (FAX)
steve@condrey-consulting.com
jan@condrey-consulting.com
www.condrey-consulting.com

Wage & Compensation Analysis

Request for Proposals (RFP) 2020 – 07

CITY OF ISLE OF PALMS, SOUTH CAROLINA



November 6, 2020



The Archer Company, LLC
1905 Oak Park Road
Rock Hill, South Carolina 29730
(803) 366-2400 • archercompany.com

Project Manager for the City of Isle of Palms study:
Rita K. Archer, MBA, CCP, Senior Consultant
Rita.K.Archer@archercompany.com • 609-304-3462 (mobile)

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Transmittal Letter



The Archer Company, LLC
1905 Oak Park Road
Rock Hill, South Carolina 29730
(803) 366-2400
archere@comporium.net

November 6, 2020

Desirée Fragoso
City Administrator, City of Isle of Palms
1207 Palm Boulevard Post Office Box 508
Isle of Palms, South Carolina 29451

RE: Wage & Compensation Analysis: Request for Proposals (RFP) 2020 – 07

Dear Ms. Fragoso,

It is a pleasure for the Archer Company to submit a proposal to conduct a Wage and Compensation Analysis for the City of Isle of Palms, South Carolina. The Archer Company is the owner and creator of the nationally known human resource management systems collectively known as the "Archer Systems". These copyrighted, state-of-the-art systems include our Matrix-Point-Factor Job Evaluation System, our Multi-Dimensional Performance Appraisal System, our Performance Indicator Job Description Format, our Comprehensive Position Questionnaire and our Quality of Work Life Survey.

All the systems marketed by the Archer Company are tried and tested systems that have evolved to their modern-day state as the result of over 30 years of experience and pace setting research. They are valid and reliable systems and methodologies. Several have won prestigious awards for their contribution to the human resource management field.

The Archer Company's professional staff combines years of hands-on experience in private and public sector organizations, both as practitioners and as consultants. We provide focus to local issues combined with the scope, resources and experience of a highly professional consulting staff. We are headquartered in Rock Hill, South Carolina, within 15 minutes of Charlotte, North Carolina. We have operational centers in Rock Hill, South Carolina; Columbus, Ohio; Raleigh, North Carolina; and Fairfax Station, Virginia. We enjoy doing this type of work; it is our specialty.

We understand that the City is seeking a wage/salary and classification study that will ensure stability, consistency, accountability, internal equity and external equity in the organization. We understand that the City is looking for viable options and strategies that would enhance the ability to attract and retain a highly qualified and motivated workforce.

As a Company, we are committed to following all Federal, State and local laws and regulations. We provide a drug free workforce and location. We do not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or other basis prohibited by state law relating to discrimination. We do not discriminate against faith-based organizations. We do not employ unauthorized aliens.

Our consultants understand the requirements of the work in the request for proposal and are committed to performing the work required to complete the project within the required time frame. Our proposal is firm. Our offer is irrevocable for one hundred twenty (120) calendar days.

Respectfully Submitted,

Sally R. Archer, President
The Archer Company, LLC

3. Statement of Qualifications

Project Team

With the Archer Company, you get who you see - the team members highlighted in our proposal will be assigned to work on this project for the City of Isle of Palms. Some firms will sell you on the qualifications of one person, typically the practice director who is on the other side of the country, but then staff the project with inexperienced consultants. With the Archer Company, you will work directly with our team of seasoned consultants who will lend their expertise in local government compensation directly to your project. *The principals of the Archer Company have been working as a team for over twenty years together.*

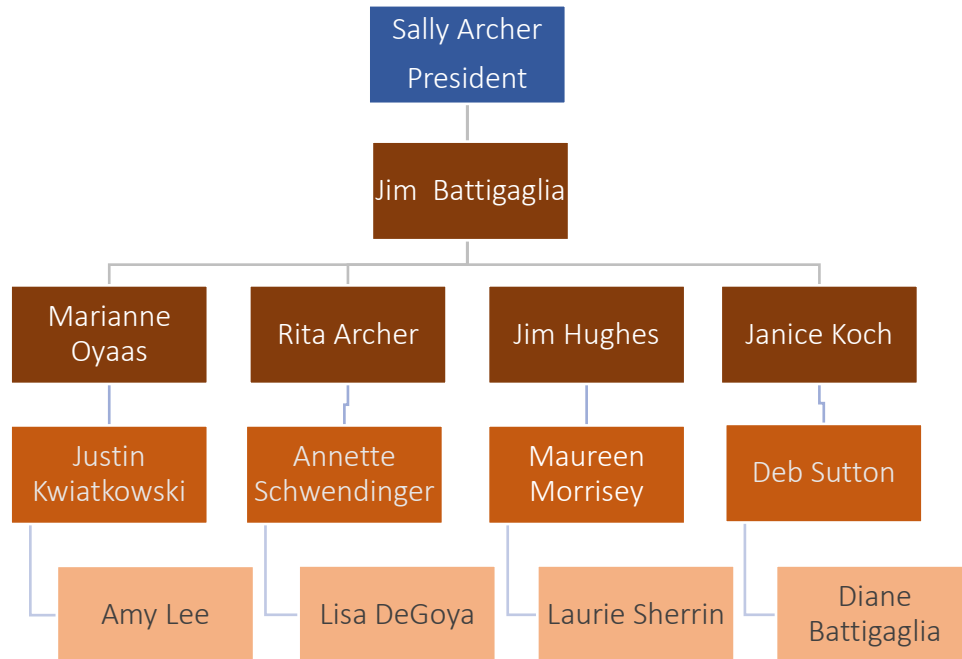
We always utilize a team approach in our work to ensure overall consistency for our clients, and we have assembled a team of experienced professionals that we believe will best provide the professional analysis and support needed for this project. Most the work on this project will be performed by our staff in Columbus, with support from personnel in our headquarters and other offices as needed. Brief biographies of our key project consultants are provided below (Consultants and Analysts will be assigned to support this project in accordance with need and availability).

Project Consultant & Client Liaison: Because of her extensive experience managing classification and compensation projects, Rita Archer will serve as the project consultant and primary point of contact for the City of Isle of Palms. Ms. Archer manages our client relations with and was the project consultant for our classifications and compensation studies for numerous entities in the Eastern region.

Proposed Project Staffing	
Sally Archer, President	Quality Control & Project Oversight: Ms. Archer will have ultimate responsibility for the project and quality assurance to our clients; Ms. Archer will provide technical guidance and oversight to all staff.
Rita Archer, Regional Manager rita.k.archer@archercompany.com (609) 304-3462	Project Consultant & Client Liaison: Ms. Rita Archer will serve as the Project Manager and Consultant and coordinate workflow and project deliverables; the project consultant oversees the construction of the pay plan recommendations (job analysis, classification, and evaluation and market analysis) and the work of the project team. Jim Battigaglia will also be a co-consultant on this project.
Jim Hughes, Senior Consultant Jim Battigaglia, Senior Consultant Janice Koch, Senior Consultant Marianne Oyaas, Consultant Deb Sutton, Consultant Amy Lee, Analyst Laurie Sherrin, Analyst	Project Team: Team members will be assigned to the project as needed based on skill-set; consultants and analysts play significant roles in the technical components of the work, including market analysis, job analysis and evaluation, job description reviews, documentation and operational support.

Key Personnel

Figure 1. The Archer Company Organization



Sally R. Archer, MSBA • President: Ms. Archer has over twenty five years' experience in working with compensation/classification systems. She holds a Bachelor of Science degree in Sociology from Georgia College and State University and a Master's degree in business from Winthrop University. She has worked as an instructor in the College of Business Administration and as an executive assistant in the Graduate School at Winthrop University. Ms. Archer has worked with hundreds of public and private organizations in the human resource management field. She began her experience in personnel work at the University of Georgia. She was Vice President of Archer Consulting, Inc. She was a senior consultant with Maximus, Inc. for eight years. Ms. Archer specializes in job analysis, job evaluation, job description preparation, salary survey administration, policy manuals and performance appraisal training.

Rita K. Archer, MBA, CCP • Senior Consultant: Ms. Archer is the lead consultant for the Eastern Region of The Archer Company. She specializes in compensation studies and wage and salary plans. She is a military veteran and has worked in several public and private sectors. She brings with her technical experience in both public and private sector human resource applications including the Total Rewards Compensation Professional Certification from World at Work. Ms. Archer excels in budget formulation and analytical skills. Recent work includes market survey and analysis for Peace River Manasota Regional Water Supply Authority, Florida; Compensation and Classification Studies for mid-sized cities in Georgia, a large public utility in South Carolina, and a regional jail authority in Virginia. She has also updated pay plans for other unique organizations such as a large home owners' association in Virginia and a WorkSource Consortium in Georgia.

Rita Archer earned her Master of Business Administration degree (MBA) from Louisiana Tech University and a Bachelor of Science degree in Chemical Engineering from The Pennsylvania State University.

- Serves as project manager developing classification and compensation systems and benefits surveys.
- Provides pay plan maintenance for clients. Provides performance appraisal systems and training.
- Provides strategic solutions, alternatives and scenarios for Fire Departments.

James A. Hughes, Jr. • Senior Consultant: Mr. Hughes is a Manager for the Archer Company and is based in Northbrook, Illinois. Mr. Hughes possesses over 35 years of technical experience in human resource consulting with heavy emphasis on compensation plan development. Much of Mr. Hughes's work in developing compensation plans has also dealt with incentive systems and with performance appraisal methods. As a result, Mr. Hughes has a well-developed expertise in compensation practice and an informed approach to recruitment, retention, and pay for performance issues. Mr. Hughes's career includes work for Towers-Perrin and for Hayes/Hill as a principal compensation consultant. He has provided compensation consulting services to over 200 companies, hospitals, not-for-profit organizations, colleges, and universities. Mr. Hughes provides oversight on compensation, classification and benefits studies.

Mr. Hughes earned a Master of Business Administration degree from the University of Chicago. He received a Bachelor of Arts degree, Summa Cum Laude, for Kenyon College in Gambier, Ohio. Mr. Hughes is a Certified Management Consultant (CMC) and a member of both the World at Work and the Chicago Compensation Association.

James V. Battigaglia, CCP • Regional Director: Mr. Battigaglia is a Regional Director and is based in Columbus, Ohio. He is one of the principals of the Archer Company. Mr. Battigaglia specializes in classification and compensation plan implementations, performance appraisal systems and other human resource engagements. Mr. Battigaglia primarily manages our human resource projects in the Midwest and Northeast. A sample of Mr. Battigaglia's experience is summarized below:

- Serves as project manager developing classification and compensation systems for twenty five years.
- Provides pay plan maintenance for clients in Ohio, Indiana, Pennsylvania, Wisconsin, Missouri, Massachusetts Tennessee and Colorado.
- Analyzed, classified and consolidated classifications of various elected offices, approximately 800 employees, into a metropolitan County's central classification plan.
- Participates in classification and compensation development projects at throughout the south.

The majority of these projects includes job analysis and evaluation, market analysis, classification structure design, job documentation, pay plan implementation design and pay plan implementation costing analysis.

Prior to the Archer Company, Mr. Battigaglia served as the Director of the MAXIMUS Human Resources and Organizational Development practice. Prior to that, Mr. Battigaglia served as a government consultant for KPMG and as the Director of Accounting for Montgomery County, Ohio.

Mr. Battigaglia received a Bachelor of Business Administration from Ohio University. He is a member of World at Work (formerly American Compensation Association) and holds the World at Work's Certified Compensation Professional certification.

Janice Koch, M.B.A. • Project Consultant: Ms. Koch has had more than twenty-two years of experience in local government and the Human Resources field. She has qualified as an expert witness for arbitration hearings regarding classification and compensation. She has been employed in the following public agencies:

- Human Resources Analyst for City of Vacaville for which she performed classification studies city-wide.
- Hearing Officer for determination of Classification issues for a mid-sized county.
- Senior Human Resources Analyst for Solano County performing aspects of Human Resources for the Division of Public Health, Mental Health, and Substance Abuse, including Employee Relations, Training, Recruitment, Classification and Compensation, and Labor Negotiations.
- Principal Human Resources Analyst for Town of Corte Madera
- Technical Assistant to the City of Napa in the research and development of hiring and promotional procedures for positions throughout the city.
- Human Resources Analyst for Sacramento County in the Exam Research and Development Unit.

Education and Other Experience:

Ms. Koch earned a Master of Business Administration from California State University at Sacramento. Her Bachelor of Arts degree is from the University of California at Berkeley. In addition to classification and compensation work, Ms. Koch is experienced in providing staff and supervisor/management training, unemployment hearings, providing supervisor support, fact-finding for negotiations, disciplinary procedures, grievance procedures, and developing personnel policies and procedures.

Marianne Oyaas, CCP • Project Consultant: She is a Total Rewards leader and strategist, specializing in companies in transition, with broad experience in all areas of compensation and employee recognition. She has considerable experience in variable compensation design, implementation and enhancement. Her strategic approaches has provided diverse success in staff, management and consulting positions, in multiple Fortune 500 companies and global organizations. Her track record of collaborating with senior executives and other key stakeholders to develop and implement strategic compensation, benefits and other total rewards programs that advance business-critical goals and initiatives. She is a project manager who thrives in fast-paced, challenging environments where a strong knowledge base, resourcefulness and creativity are required.

Expertise includes:

- Partnering with executives and other leaders to determine the best compensation and reward strategies best aligned with human resources and business goals and objectives.
- Extensive experience in developing, maintaining and enhancing base, variable and executive compensation plans for private, not-for-profit and public organizations.
- Stakeholder analysis and consensus-building.

- Teaches businesses and human resources professionals in the areas of incentive plan design and administration, sales compensation design and administration as well as in the development of base pay plans.
- Market pricing, as well as point-factor and other quantitative job evaluation and job pricing methodologies.
- Executive compensation including stock plan administration, research and analysis for Proxy and Compensation Committee materials, executive compensation benchmarking, participation in LTI design, executive communication, and merger-related communication.
- Project management including building effective liaisons and collaborating with multiple business areas, leaders and vendors.
- Compensation management and administration in county and municipal environments.
- Comprehensive data analysis, scenario modeling, compensation costing and reporting.
- Preparing and presenting effective business cases in order to gain support and “buy-in” for major changes in compensation philosophy, direction and initiatives.

Project Relationship Management

Relationship Management: While the Archer Company utilizes a team approach in our work, every client is assigned a senior consultant who will manage the project and serve as the primary project liaison to the client. The project consultant is expected to devote a significant amount of time to the project and will be hands-on in the development of all recommendations. The workload of all our consultants is balanced to ensure that they give their full attention to each task at hand and complete deliverables in a timely manner. The team approach ensures that all work receives the scrutiny of a second and usually third set of eyes—even the work of our most experienced consultants is subject to review by the team to ensure the highest quality of service.

Back-up Procedures: The Archer Company is committed to exceptional customer service, which means that our clients should have open communication with and reasonable access to their assigned project consultant. Our principals use the latest technology to maintain contact with our clients while in or out of the office—this allows us to communicate and respond to inquiries via cell phone, email, or text messages when traveling. Phones from the local offices will be forwarded to the corporate office as a backup measure. Should the project manager be out of contact for an extended period of time, members of the project team will be available to answer questions and address issues as needed. If at any time the client is unsatisfied with the level of service they receive, they may contact the President of the company directly for resolution of the problem.

Client Communication and Coordination: The Archer Company is committed to active communication and coordination with the Client’s project team and Client management. It is expected that regular communication between management and the Archer Company will help to keep the project on track and ensure a successful outcome.

- **Project Consultant:** To ensure that The City of Isle of Palms receives a high level of customer service from and the full attention of the Consultant, the Archer Company will assign a qualified, dedicated Project Consultant who will spend a substantial amount of time on-site throughout the planning, execution, and implementation of the study; this individual has expertise in classification and compensation for local government. The Project Consultant will be accountable to the client and able to respond to day-to-day inquiries. As there will be times in which the team is onsite but out in the field, we will work with Human Resources to communicate project status so that the City of Isle of Palms team can track our progress and know our whereabouts.
- **Project Meetings:** The Archer Company will meet with the project team as appropriate during strategic points of the study in order to seek their input and facilitate their review of key components and deliverables of the study. The City of Isle of Palms Management will be asked to participate in the decision-making and review process; we also understand that The City of Isle of Palms may review the project status and progress as needed.
- **Progress Reports:** The Archer Company will submit periodic progress reports to management throughout the study to apprise management of any issues that arise during the course of the study. Reports will detail specific accomplishments during the reporting period; account for the completion of tasks pursuant to the provisions of the contract; and provide projected completion dates for remaining project tasks. The progress reports will refer back to the project plan and timeline as agreed to in the initial project planning.

4. Project Plan

Methodology & Guiding Principles

Project Organization & Expectations: The project is to be organized as a strategic partnership between the project team, department directors, and the consultant, under the oversight and direction of Management and the governing board. The Archer Company, in all of its studies, expects to produce all products in a turnkey fashion, performing all necessary technical and professional work. Client staff will be expected to assist the Archer Company's team only in scheduling meetings and transferring data collected for the study, and to provide input into philosophical issues pertaining to the development of the classification structure to meet the needs and preferences of the client. Although generally accepted procedures, methodologies and formats will be used to conduct the study and preparation of deliverable products, the content of final products will be specifically tailored to the unique circumstances, requirements, and financial disposition of the client. It is the philosophy of the Archer Company that the process of establishing a classification and compensation system for an organization must necessarily be a collaborative effort of both management and employees of that organization, with the guidance of the consultant. Only with this inclusiveness can a plan be produced that will more easily be accepted by management as feasible and affordable, and by employees as fair and unbiased. The Archer Company provides an approach that allows management and employees to understand the process and participate in the development of the compensation system, in order to ensure the successful implementation of a pay plan under which they will operate into the future.

During the course of the study, management, Human Resources, key personnel, and other employees will be a part of the collaborative effort to develop a classification plan and related products and will have the opportunity to review draft plans and models. The consultant will discuss with management the client's goals and compensation objectives and explore the various human resource management approaches to determine the approach or approaches that best meet the client's needs.

Compensation Philosophy: The Archer Company adheres to the principle that an employee should be paid in accordance with the degree of complexity associated with his or her job. This principle is fundamental to the concept of internal equity or non-discrimination. To achieve internal equity in an organization's pay structure, it is necessary that an organized and rational job evaluation system be employed to determine the relative worth of jobs. The establishment of equal pay for equal work, equal pay for similar work, equal pay for comparable worth and other relative-worth requisites within a pay structure demands the use of a valid and reliable job evaluation system. It is the only way that internal equity in an organization's pay structure can be achieved.

The Archer Company also adheres to the principle that an organization's pay structure must possess competitive integrity, i.e., the ability to secure a competent labor force from the labor market(s) in which it competes with other organizations for its labor supply, without injuring its relative competitive position with regard to the cost and pricing of its products and services. This principle is fundamental to the concept of external equity.

The impact of current labor market conditions and basic supply-and-demand economics must be considered when developing an organization's pay structure. Jobs that have an adequate applicant pool can usually be recruited at a pay rate that may be lower than absolute reliance on job evaluation indicates. Conversely, jobs that have a limited applicant pool may require compensation higher than the job evaluation indicates. To achieve external equity in an organization's pay structure; it is necessary that the competitive worth of jobs be determined. This can be accomplished by conducting valid and reliable salary and wage surveys.

The Archer Company has found that public sector organizations are constantly exposed to changing classification descriptions as a result of new programs, organizational changes, etc. Often such organizations rely upon a predetermined library of classifications to establish the level of any new or changed job. In such a "closed" system, it is difficult to establish and defend classification recommendations for new jobs, especially when no precedence exists. Through use of a valid job evaluation system to determine classification levels, the compensation and classification program becomes "open." In an open system, there is no reliance on benchmark classifications for comparison; jobs are analyzed and, through the evaluation and salary survey process, are simply inserted into the classification program. Organizations that employ valid job evaluation and salary surveying techniques as their primary instruments for determining classifications benefit from a customized work force and a classification program more closely based on actual duties performed.

To support pay equity, the Archer Company believes that sound salary administration and advancement programs must be established. Policies should address basic recruitment requirements, special recruitment requirements, performance measures, job structure changes, organizational changes, financial capabilities, and day-to-day administration of the pay system.

As salary advancement plans are implemented, policies and procedures must be flexible enough to address variances that inevitably occur, often on a daily basis. A compensation system must be flexible enough to

adhere to the dynamics of the marketplace and the laws of supply and demand as they affect recruitment and retention and be able to facilitate minor and major changes in jobs and/or organizational structure.

Job Evaluation: The importance of internal equity in an organization's pay plan cannot be underestimated—especially for local governments that are under constant scrutiny. For most of the classification and compensation consultants in this business, internal equity is an after-thought. They focus primarily on market comparisons and attempt to reconcile internal equity through whole-job analysis or a weakly construed job evaluation "system." ***Dr. Archer is widely recognized as an innovator in job evaluation methodology—the Archer Job Evaluation System™ was the first point-factor matrix of its kind.*** It has tested positive against four different measures of validity and has proven to be effective for almost three decades of direct application to local government. Many of our competitors have tried unsuccessfully to duplicate our system, but none can match the combination of expertise and local government experience offered by the team from the Archer Company.

The Archer Company utilizes the Archer Matrix-Point-Factor Job Evaluation System, a system used exclusively by the Archer Company and its clients. The Archer System uses factors universal to all jobs to compare the relative worth of each job with all other jobs in the organization and integrates this data with salary and wage data from the labor market. With the Archer System, each job is evaluated with the same criteria and there are no pre-determined points or profile statements that jobs must be fitted to. This results in an "open" classification system, as discussed above in the compensation philosophy section of this proposal.

The primary objective of the job evaluation system is to determine the various degrees of complexity associated with each of the jobs in the organization. The more complex jobs receive more evaluation points and therefore, when job evaluation data is integrated with salary and wage survey data as described below, they receive greater levels of pay. Less complex jobs receive fewer evaluation points and theoretically lower levels of pay. This ensures that jobs of similar complexity are compensated at comparable pay rates. Because every job in the entire organization is evaluated against the same set of universal criteria, use of the Archer System ensures that there is absolutely no unlawful discrimination (i.e., based on race, gender, or physical or mental disability) with respect to the determination of which jobs in the organization are more complex than other jobs in the organization.

The Archer System is superior to traditional systems such as Hay, Oliver, and the Federal Evaluation System because it prioritizes and appropriately weighs the various compensable factors. The Archer System employs universal factors that address work requirements, aptitude, and responsibility. The system is applied through the use of a matrix-point-factor analysis of thirty work requirements and aptitude factors and three dimensions of responsibility.

Salary Surveys: To determine the proper salary and wage survey scope, the Archer Company will discuss recruiting patterns with key personnel to gain an understanding of the client's applicant availability pool. The applicant availability pool is defined as the number of potential applicants possessing the requisite knowledge, skills and abilities to perform the essential functions of each job. For example, the client's recruiting history may indicate that the required survey area for clerical personnel can be limited to the local area and contiguous counties, cities, and school systems. Conversely, findings may indicate that department head personnel require a survey area that spans the state or the region.

Organizations within the applicant availability pool comprise the competitive labor market within which the client competes for its labor supply and within which the client's salary ranges must be competitive to attract

and retain quality personnel. The Archer Company's representatives will develop with Management the specific organizations in the *comparative* labor market the client would like surveyed. The comparative labor market may include public and private sector organizations whose pay practices reflect the level the client would like to attain, such as public agencies and businesses of similar size and economic and/or demographic makeup.

Regardless of the geographic area required for comparing salary and wage information, the Archer Company will weigh the data collected in consideration of such criteria as population, geographic size, special recruitment needs, competition for the labor force, organizational structure, and type of industry.

Details of Plan

Based on our understanding of the City's compensation needs, the Archer Company is pleased to offer the following project plan to accomplish these objectives. The methodology utilized by the Archer Company is consistent with the methodology employed successfully in all our engagements of this nature nationally and is supported by our proprietary job evaluation system. This project is conceived as a multi-task effort—while it is necessary to conduct the phases in the general order presented, there may be overlap in the time frame for each task. All project tasks and deliverables will be scheduled so as to allow for timely completion.

The following is intended to be an outline of the project plan and progression of the proposed work; a more detailed discussion of our methodologies is presented immediately after the scope of work:

1. **Project Planning & Kick-off:** Discussions are held with The City of Isle of Palms' project team to discuss expectations, gather information, and plan project implementation. The Archer Company will work with the City Management and Human Resources staff to obtain clarification regarding the City's organizational structure, compensation concerns, expectations of study results, and other relevant matters. During this time, we will seek to solidify our understanding of the City's compensation philosophy and solidify the project timeline. The following tasks are expected to take place as part of the kick-off process:
 - **Review the Current System:** The Archer Company will assess The City of Isle of Palms' current pay plan and compensation systems in order to determine both the strengths and weaknesses of the system. This assessment will help to shape our recommendations for improving the pay plan. We will submit a list of information requested from the City to facilitate our review of the pay plan. The Archer Company will ask the City representatives to compile the following information:
 - Employee database containing pertinent information (identified by the Archer Company);
 - Copy of your current pay plan showing job titles, grades, and salary ranges (if available);
 - Current job descriptions or classification specifications;
 - Organizational charts for all departments included in the study;
 - List of department heads and key managers with phone numbers and email addresses;
 - Copy of your Personnel Policies & Procedures;
 - Any additional documentation that will aid the Archer Company understanding of the City's compensation philosophy, management style, working environment, etc.

- **Meetings with Management:** The Archer Company will conduct meetings as with the City's Project Manager, Human Resources staff, and any other key stakeholders identified by the City (referred to herein collectively as 'City Management'). The purpose of these meetings will be to discuss concerns and objectives regarding the current classification and compensation system, methodology to be utilized in the study (e.g. job analysis, job evaluation, salary survey, etc.), best practices for local government compensation; compensation philosophy, and expectations. We will meet with this team at strategic junctions throughout the study to solicit input and facilitate review of findings as appropriate.
 - **Orientation Meetings for Management:** The Archer Company will conduct an orientation meeting for department heads and other officers with similar authority to explain the project and the role that departments will be asked to play during the course of the study. The Archer Company will solicit input from department heads and key supervisors about their operations and how the department is impacted by the pay plan and the classification of their subordinates. We will also meet individually with department heads to review their operations and discuss the classification of their subordinates.
2. **Job Analysis, Classification, & Evaluation:** The Archer Company will establish internal equity for all positions covered by The City of Isle of Palms' pay plan by conducting job analyses, reviewing classification assignments, and evaluating classifications. The analysis will utilize *Comprehensive Position Questionnaires* completed by employees, the input provided by the departments in the packets, and information compiled from discussions with the project team and management. The purpose of the review is to ensure that positions are properly classified and the job evaluations for each classification (and therefore the pay grades) are consistent with the work performed. This process becomes the foundation of the pay plan's principle of internal equity.
- **Job Analysis:** A detailed job analysis is performed for every position included in the study in order to ensure that positions are properly allocated within the City's pay plan-based duties, responsibilities, and qualifications. All employees are asked to complete a *Comprehensive Position Questionnaire*, which will assist in identifying duties and responsibilities for each position. The *Comprehensive Position Questionnaires* and information gathered from each department are the primary source of data for this review but are supplemented heavily by discussions with supervisors and department heads, group employee interviews, follow-up questions to employees as necessary, information about the organizational structure, research, and data from outside sources.
 - **Employee Questionnaires:** At least one employee from each classification will complete a *Comprehensive Position Questionnaires* (CPQs) that will serve as a primary resource during the job analyses phase. The Archer Company utilizes a copyrighted questionnaire that has proven very effective as a tool to gather in-depth data about each position without placing too high an administrative burden on the employees. The questionnaire data is essential to the proper analysis, classification, and evaluation of the City's positions.
 - (1) The Archer Company will supply the questionnaires to The City of Isle of Palms electronically (hard copy if needed) along with instructions and additional documentation to help facilitate this effort.
 - (2) The Archer Company asks department management to ensure that the forms are completed, reviewed, and returned to the project team in a timely fashion. Department heads are expected to play a key role in ensuring that all information collected from

employees provides accurate, thorough, and quality data for use in the job analysis of their subordinate positions.

- **Interviews:** The Archer Company will allot time to interview each department director to discuss departmental services and any classification and compensation issues. Many City jobs are very well established in the area and can be covered adequately with the questionnaires; likewise, discussions with department directors can provide additional understanding of jobs.
- **Classification of Positions:** The City's classifications will be carefully reviewed and analyzed against the information captured in the job analyses; the Archer Company will make recommendations to add, delete, consolidate, or revise classifications as appropriate to ensure that they reflect current operations and position assignments throughout The City of Isle of Palms and to eliminate duplication of titles as appropriate.
 - It is particularly important in large and diversified organizations to ensure that classifications are utilized consistently across positions in multiple departments.
 - Classifications will be reviewed to ensure that: (1) essential functions are accurate and up-to-date; (2) knowledge, skills, competencies, and abilities are identified; and (3) minimum qualifications (criteria for entrance), physical requirements, and environmental factors are reflective of the work performed.
 - Once appropriate classifications are identified and the title and scope for each classification is defined, positions are allocated to classifications accordingly. This will allow for fair and equal treatment of similar positions that may exist in multiple departments and is critical to the principles of equal pay for equal, similar, and/or comparable work.
 - The structure of the classification system (e.g. the breadth of the scope of assigned duties, number of classifications, job series, title schematics, etc.) will be designed in accordance with the City's compensation philosophy, operations, and anticipated pay plan alternatives. The Archer Company will seek input from Human Resources regarding the most appropriate structure for The City of Isle of Palms.
- **Job Evaluation:** Because the importance of internal equity in an organization's pay plan cannot be underestimated—especially for local governments that are under constant scrutiny, the Archer Company recommends the use of a valid and reliable quantitative job evaluation system to objectively measure and determine the relative worth of each classification to the organization. The Archer Company utilizes the *Archer Matrix Point-Factor Job Evaluation System* as our primary method to objectively measure and determine the relative worth of each classification to the organization. We will work with Management and Human Resources to ensure that the methodology utilized provides a good fit with The City of Isle of Palms' objectives, and we are open to using additional methodologies if necessary.

The Archer System is a point-factor evaluation matrix that provides a state-of-the-art methodology to measure the relative value of the City's classifications and validity in the pay plan's internal equity; it has tested positive against four different measures of validity and has proven to be effective for almost three decades of direct application to local government. An overview of the factors utilized by the Archer System is provided in the Methodology section; however classifications will be aligned within a job-worth hierarchy and placed into pay grades based on the criteria listed below:

- (1) The degree of critical impact on departmental/City operations
 - (2) Amount of discretion and judgment exercised by the position
 - (3) Organizational responsibilities (span of control, etc.)
 - (4) Job categories (clerical/administrative, skilled/technical, professional, supervisory/management etc.)
 - (5) Knowledge, skills, abilities, and competencies required of the classification
 - (6) Minimum qualifications for the class (balance between education and experience with accommodations for professional licenses and certifications)
 - (7) The degree of physical effort and personal risk inherent in the job
- The design of the pay grade structure will reflect the desired approach to classification and overall compensation
 - **Review of Pay Plan Structure:** The review of internal equity will include a review of the City 's classification structure (e.g. the breadth of the scope of assigned duties, number of classifications, title schematics) and the proposed pay plan structure (number of pay grades, width of ranges, use of steps, etc.) to ensure that they support and facilitate the City 's compensation philosophy and operations.
 - The Archer Company will pay particular attention to critical or problem classification areas identified by The City of Isle of Palms.
 - Department directors will be asked to work directly with the project team and the Archer Company in the review of the classification structure for their functional areas.
 - The Archer Company will present draft reports detailing our preliminary analysis of internal equity to City Management, Human Resources, and the project team, to include the evaluation of classifications and the classification of positions. All feedback and concerns will be carefully reviewed and addressed prior to finalization of the pay plan recommendations.
3. **Market Survey & Analysis:** The Archer Company will collect and compile salary data for the City of Isle of Palms and analyze the results to assess the impact of the City 's competitive market on the pay plan. To the extent possible, we will also solicit information regarding general compensation and pay plan administration practices to aide our analysis. The Archer Company will ask the City of Isle of Palms to approve the list of benchmarks and targeted survey participants prior to survey development. Data collected in the surveys may be supplemented by data from published sources where necessary and appropriate. The data collected will be compiled and submitted to the City in a comprehensive, easy to read report.
- A list of benchmark positions to be included in the survey will be identified and submitted to the City for input and approval. ***The City of Isle of Palms will be asked to approve the final lists of benchmarks.*** Benchmark positions are generally selected to represent the continuum of the City 's classifications, focusing on: (1) positions which are widely recognized as possessing similar job content in most organizations; (2) positions for which the City of Isle of Palms may have had difficulty recruiting and retaining a qualified work force; (3) positions which represent a substantial number of employees as well as the various job families; (4) positions considered highly technical or vital to the organization or those with high public interest; and/or (5) positions which represent the full array spectrum of salary grades and ranges in the pay plan (including executive and various administrative classifications).

- A list of organizations to be included in the survey will be identified and submitted to The City of Isle of Palms for input and approval. ***The City of Isle of Palms will be asked to approve the final lists of targeted survey participants.*** Jurisdictions with the following characteristics are typically surveyed: (1) organizations with which the City competes for employees; (2) organizations which are recognized as important, or influential, in the local market place; (3) organizations which are within proximity to the City's competitive market (i.e. the same geographic region); and/or (4) organizations with similar population, demographics, and scope of services. We understand that The City of Isle of Palms desires to capture data from the private sector in addition to public sector organizations.
- The Archer Company will construct a customized survey designed to collect the data requested by The City of Isle of Palms. The Archer Company utilizes a specific format for wage and salary surveys that has proven to optimize the collection of the data while minimizing the burden to participating jurisdictions; however, this format may be customized to meet the needs or objectives of the City. Our surveys typically include sections regarding base and supplemental pay, and any supplemental questions the Archer Company or the client feels would be beneficial to the study.
- A draft of the survey document will be submitted to the Human Resources staff for review, and appropriate revisions will be made before the survey is initiated. The Human Resources staff will be asked to approve the final survey document.
- The Archer Company will identify and compile the contact information for the targeted organizations. Each organization will be contacted by phone to invite their participation prior to distribution of the survey.
- The survey will be developed as an electronic form to facilitate completion by the targeted organizations. The Archer Company will distribute the electronic survey tool to all participants; a paper copy of the survey is also made available.
- The Archer Company will contact each participant after the survey has been distributed and provide any follow-up assistance participants may need to complete the survey.
- The Archer Company will make every reasonable effort to solicit and encourage the participation of the targeted agencies; however, we may ask the City of Isle of Palms personnel to follow-up with any personal contacts that may help influence participation.
- The Archer Company will carefully analyze the results in order to assess the City of Isle of Palms' position relative to the competitive labor market within which it competes. All data collected will be compiled, tabulated, and edited as appropriate to ensure the accuracy and consistency of match with the selected benchmarks. Salary data gathered is carefully analyzed to ensure a high level of validity in our findings.
- The Archer Company will contact participants directly to clarify their responses and to solicit additional information as necessary to ensure that appropriate comparisons made. Significant

differences between the job functions for similarly titled positions will be identified and factored into our analysis.

- The survey analysis will account for the size and scope of participating organizations, and differences in job responsibilities.
4. **Design & Development of the Pay Plan:** The Archer Company will incorporate our findings from the review of internal equity with the data collected in the market analysis in order to provide recommendations for the City of Isle of Palms' pay plan.
- The Archer Company utilizes mathematical regression analysis to integrate the relative worth of classifications (job evaluation points) with the competitive worth of each classification in the competitive labor market (market rates).
 - This produces a pay schedule (a list of pay grades and their respective salary ranges) that can be structured and customized to reflect the organization's compensation philosophy. Thus, the new or revised pay plan will be designed to meet both internal equity and competitive needs.
 - The recommended pay plan will reflect the cooperative result of organizational discretion paired with the professional guidance and facilitation of the consultant.
 - The recommended pay plan will be designed to reflect and incorporate the City of Isle of Palms' compensation philosophy, to include the City's desired position in the market.
 - We will review the results with management and make a determination as to whether separate pay schedules are needed and identify the potential for consolidating the tables. If desired, we will develop a step table for sworn positions.
 - Job analysis and evaluation is used to establish the appropriate internal relationship between benchmark classifications and the remaining classifications in order to tie non-benchmark classifications to the plan.
 - The universal design of our system provides for optimal equity across departments and job families.
5. **Implementation & Administration:** The Archer Company will work with the City of Isle of Palms Management and Human Resources to recommend strategies for implementing the updated pay plan to include estimated calculation of costs associated with the update.
- The Archer Company will review and make recommendations regarding the City of Isle of Palms' current pay plan and practices. The focus of this review will be to identify improvements to the City's maintenance of the pay plan and other methods to move employees through the pay ranges, policies and procedures, and overall compensation strategy.

6. **Preparation & Presentation of Reports (Draft and Final):** The Archer Company will compile our findings and recommendations into a report showing a summary and analysis of the results, along with the raw data collected. The report will also include a discussion of any recommendations resulting from our findings. The Archer Company will provide draft reports detailing our findings and discuss the preliminary results with The City of Isle of Palms' project team. All feedback from management will be carefully considered and appropriate changes will be made prior to submitting the report in final form.
 - The Archer Company will present our findings to the City of Isle of Palms' project team and management.
 - All documentation and manuals will be provided to the City. The final report will be submitted to the City in both paper and electronic format compatible with popular spreadsheet and word processing programs (Microsoft Word and Excel).
7. **Pay Plan Maintenance & Support:** The Archer Company offers a full menu of optional services to support the City of Isle of Palms and assist in the maintenance of the new pay plan, which are provided to the City on an as-needed basis. These services are geared towards maintaining both the internal equity and competitive integrity of the plan to ensure the longevity of the plan over time and are structured to provide a level of assistance tailored to meet each client's professional needs and financial considerations. The Archer Company prides itself in our ability to establish and maintain long-term relationships with our classification and compensation clients. This ensures that the pay plan developed for the City will be easy to administer, maintain, and defend over time.

Work Schedule

Project Task	Task #	Week	Hours
Planning & Kickoff	1		40
Planning Meetings		Week 1	
Employees complete questionnaires		Week 2-4	
City reviews questionnaires and submits them to Archer		Weeks 5-6	
Complete Job Analysis	2 & 3		40
Archer reviews questionnaires		Week 7-10	
Conduct employee interviews		Week 9	
Evaluate Classifications	4		120
Evaluate classifications		Weeks 7-10	
Confirm pay grade structure with the City		Week 10	
Submit internal equity to the City		Week 11	
City reviews & responds to internal equity		Week 12	
Archer Company revises internal equity		Week 13	
Salary Analysis	5		90
Identify & approve benchmark positions		Weeks 2-4	
Finalize targeted labor market		Week 5	
Construct customized salary survey		Week 6	
Conduct salary survey		Weeks 7-10	
Analyze salary data		Weeks 10-13	
Submit initial salary analysis		Week 14	
City reviews & responds to salary survey data		Week 15	
Develop the Pay Plan	6		50
Design pay plan structure		Week 16	
Integrate internal & external equity (regression analysis)		Week 17	
Upload payroll & assign employees to classifications		Week 18	
Submit draft pay plan to the City		Week 19	
Determine pay plan implementation scenarios	7	Week 20	40
Submit draft reports to the City	8	Week 22	60
City reviews draft reports		Week 24	
Submit final reports	9	Week 26	40

Because of the critical and sensitive nature of comprehensive classification and compensation studies, it is prudent for the City of Isle of Palms to emphasize the importance of favoring the quality of the work product over an ambitious timeline. The project timeline will be finalized during the initial meetings with management, and individual tasks will be scheduled as appropriate to complete the study within the agreed upon timeframe of the City.

Project Tasks

TASK 1: Conduct Planning & Orientation Meetings

- 1.1 We will meet with the Project Team as the key contacts for the study to discuss expectations with respect to the development and implementation of the study and explain the Comprehensive Position Questionnaire (CPQ). Project time frames will be finalized. We will collect document regarding the current pay plan and pay administration policies.
- 1.2 We will conduct orientation meetings with department directors to discuss the project and the new CPQ.

TASK 2: Employees Complete the Comprehensive Position Questionnaires (CPQs)

- 2.1 Selected employees for each classification will complete and return completed Comprehensive Position Questionnaires (CPQs) to supervisors for review and approval.
- 2.2 Supervisors will review and forward the completed questionnaires to the appropriate department director.
- 2.3 Department directors will review and return the completed questionnaires to the Human Resources who will review them for completeness and send them to the Archer Company.

TASK 3: Conduct Job Analysis

- 3.1 The Archer Company will carefully review each completed CPQ and any comments.
- 3.2 We will meet individually with department directors to discuss their operations, discuss any classification and compensation issues they may have, and obtain their input.

TASK 4: Conduct Job Evaluation

- 4.1 The Archer Company will evaluate the data provided in the CPQ's and obtained from the employee interviews using the Archer Matrix-Point-Factor Job Evaluation System.
- 4.2 We will submit an initial job evaluation listing to the City for review.
- 4.3 We will respond to any concerns of the City regarding the job evaluation results.

TASK 5: Conduct Salary Survey

- 5.1 The Archer Company and the City of Isle of Palms will define the target labor market and benchmark jobs for the salary survey.

- 5.2 We will develop a salary survey instrument. The survey will request information about, organization size, compensation practices, pay ranges, actual salaries, and pay structure. We will submit the instrument to the City for review.
- 5.3 We will identify and compile the contact information for the targeted organizations and distribute the electronic survey instrument to participating organizations. We will determine with the City which, if any, published surveys should be considered.
- 5.4 We will analyze the survey data to calculate the mean market rates paid for the benchmark jobs along with other compensation practices.
- 5.5 We will submit the analysis of the survey data to the City for review and comment.

TASK 6: Develop the Pay Plan

- 6.1 We will integrate internal equity (job evaluation data) and external competitiveness (mean labor market rates) for the benchmark jobs via linear regression analysis to determine pay range midpoints once the “size” of the pay grades is determined. We will also make recommendations based on pure market competitiveness.
- 6.2 We will work with the City of Isle of Palms to develop the number of pay grades and the pay range structure.
- 6.2 We will assign the appropriate pay grade and pay range to each classification

TASK 7: Recommend Implementation Plan and Pay Plan Policies

- 7.1 The Archer Company will work with the City of Isle of Palms to develop the most appropriate strategy for implementing the recommended pay plan within the City’s financial constraints.
- 7.2 The Archer Company will provide estimated pay plan implementation costing scenarios.

TASK 8: Present Draft Report and Recommendations

- 8.1 We will submit a recommended pay plan draft report to the City of Isle of Palms. The draft report will include the new pay table, alphabetical listing of jobs, and grade order listing of jobs.
- 8.2 The City of Isle of Palms will review and comment on the draft reports.

TASK 9: Present Final Report and Recommendations

5. References

The Archer Company's Human Resource Management practice has provided services to well over a thousand public and private sector clients across the nation. Each study always addresses the needs of the clients whether dictated by past practice, new legislation, or growth.

Town of Mount Pleasant, South Carolina.

The Archer Company successfully completed a classification and compensation study for the Town in 2020. The scope of the study included job analysis and evaluation of all jobs in the organization and re-design of the Town's pay structure. The scope also included revisions and simplification of the classification structure. We have advised the Town on improved methodology to maintain the internal equity and market competitiveness of the plan over time. We will continue to provide, as needed, job evaluation and grade recommendations services. We also created new classification descriptions and completed a detailed and comprehensive benefits survey with findings and specific recommendations. Jim Battaglia was project manager on this project

Ms. Meghan Kelly, Human Resources Officer, Town of Mount Pleasant
100 Ann Edwards Lane, Mount Pleasant, South Carolina 29464
Phone: 843-884-8517 • Email: mkelly@tompsec.com

City of North Myrtle Beach, South Carolina.

The Archer Company successfully completed a classification and compensation study for the City of North Myrtle Beach. The scope of the study included job analysis and evaluation of all jobs in the organization and the provision of a new pay structure. The scope included new and revisions to job descriptions. ADA and additional safety requirements were added to the job descriptions. We have advised the City on improved methodology to maintain the internal equity and market competitiveness of the plan over time. We continue to provide, as needed, job evaluation and grade recommendations services. We also provide consultation and services on new positions. We have been providing updates to the City since 2012. Sally Archer was co-manager on this project.

Ms. Crystal McGhee, Human Resources Technician II
1018 2nd Avenue, South, North Myrtle Beach, SC 29582
Phone: 803-280-5650 • Email: cmcghee@cityofnmb.net

City of Covington, Georgia

The Archer Company successfully completed a classification and compensation study for the City of Covington in 2020. The scope of the study included job analysis and evaluation of all jobs in the organization and the provision of a new pay structure. We have advised the City on improved methodology to maintain the internal equity and market competitiveness of their pay plan. We continue to provide, as needed, job evaluation and grade recommendations services. We also provided the City with a step plan for their Fire Department. Rita Archer was project manager on the project.

Mr. Asher Dozier, Human Resources Assistant Director
2194 Emory Street, N.W., Covington, GA 30014
Phone: 770-385-2000 • Email: adozier@cityofcovington.org

6. Detailed Cost Proposal

The following fixed fee proposal is prepared for the City of Isle of Palms, South Carolina based on the proposed scope of work herein. The not-to-exceed proposed fees include all travel, per diem, photocopying, or other incidental expenses. Costs assume the inclusion of approximately 39 job classifications (job titles). This fee proposal is valid for 120 days from the date on the proposal.

Compensation Study	Cost
Project Planning & Start-up	1,700
Job Analysis	1,900
Job Evaluation	3,500
Market Survey & Analysis	4,600
Plan Development & Implementation	1,600
Draft & Final Reports & Presentations	1,200
Total	\$14,500

We anticipate submitting monthly invoices based on completed work.

The final report will contain a narrative summary, tables, schedules, and charts containing the results of the job analyses and evaluations as well as the salary survey. Training for staff and materials necessary for the implementation and maintenance of the compensation/classification system will be provided. Archer Consultant(s) will be available to present the findings to City Management at a mutually agreed upon time and place.

Optional /Companion Services:

The Archer Company offers yearly license agreements for the MaxArcher© **Job Evaluation** software at \$3,500/year (optional).

The Archer Company offers a companion **Performance Appraisal** System to distribute pay increases in a fair and equitable manner. This performance appraisal system can easily integrate with and support pay-for-performance, incentive, bonus, skill-based pay, and other reward systems. It is a valid and reliable performance appraisal system with advanced conceptual insights, state-of-the-art automation, and high-quality training manuals. Additional \$3,000.00 (optional).

The Archer Company offers an **Employee Benefits** Survey administration from our question bank and a summary of responses through a commercially available online platform. Additional fee \$5,000 (optional).

Appendix: Sample Report

REPORT AND RECOMMENDATIONS

PAY CLASSIFICATION AND COMPENSATION STUDY

***City of XXXXXX,
XXXXXXXX***

2020



Corporate Headquarters:

Charlotte, NC / Rock Hill, SC

1905 Oak Park Road

Rock Hill, South Carolina 29730

Phone (803) 366-2400 • www.ArcherCompany.com

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EXECUTIVE SUMMARY

PAY CLASSIFICATION AND COMPENSATION STUDY

2020

The purpose of the wage and salary survey and the subsequent analysis was designed to determine the competitive worth of each job in the City of XXXXXX for the purpose of establishing an equitable, comparable, and competitive *pay range* for each of the jobs in the city and to determine whether the city was keeping pace with the market organizations with regard to employee compensation. The custom market survey comparables included the cities of AAAAAA, BBBB, CCCCCC, DDDDDDD, EEEEEEEE, FFFFFFFF, and GGGGGGG. Certain benchmarks were verified using a survey conducted through a professional utility organization and a small sampling of private data from the Economic Research Institute survey.

Market survey average pay rates were statically correlated with job evaluation point values for the city's jobs (*Exhibit 5 graph*) to determine a market pay line. The market survey "line-of-best-fit" defined the relationship that was pertinent to the development of a valid, reliable, effective, legally defensible, non-discriminatory, and competitive pay structure for the City's jobs. The recommended pay plan has a 50% spread from minimum to maximum for the City of XXXXX's pay ranges. (*Exhibits 6 and 7*).

A fair method for calculating salaries when implementing this study utilizes the employees' tenure in their current positions to place each employee into the pay range based on the number of years he or she has held the position. In order to avoid pay compression and keep employees on track toward the midpoint of the pay structure, the funding requirements for salaries need to be adjusted toward the midpoint taking into consideration the length of time each individual has held their current position.

The acceptance of the findings and recommendations of the Archer Company's study by the City Council will be the concluding step in the study and report process.

RECOMMENDATIONS: It is recommended that each employee be brought to the minimum of the pay range for his or her grade as quickly as is economically feasible, and that tenured employees are treated fairly with respect to seniority to avoid salary compression issues. Two cost options are provided below. A phased approach may be considered due to fiscal constraints.

- **Option 1: Bring all City of XXXXXX employees into the new pay ranges:**

From <i>Exhibit 9</i> :	Approximate cost = \$7,125.
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- **Option 2: Placement of all City of XXXXXX employees into new pay ranges based on tenure:** Placement of each individual employee into the new pay range at a tenure-based position to avoid pay **compression** issues –5% of midpoint/year up to midpoint.

From <i>Exhibit 9</i> :	Approximate cost = \$51,686.
-------------------------	------------------------------



Five-year Goal: To provide for each employee's salary to meet the **midpoint** within five years of hiring. Candidates who meet the minimum requirements at hiring may start at the minimum of the pay range, while those candidates who have more appropriate experience may start further into the pay range. A Step Plan is provided to assist with initial placement of well experienced and/or highly educated employees. Employees who meet performance appraisal expectations should expect to be paid near the **market pay rate** (i.e. toward the **midpoint** of the pay plan) by the five-year point. Pay increases of 5% per year meet the goal to have those employees who "meet expectations" to reach the salary range **midpoint** at the 5-year point. The five percent (5%) per year pay raise is based on the midpoint and is calculated by dividing the percentage spread from minimum to midpoint (25%) by 5 years.

We do not recommend reducing any current salaries based on this study. The integrity of the pay plan can be achieved over time by established pay ranges going forward. The ranges are expected to increase by the Cost of Living Adjustments each year, so those salaries above the range will eventually fall in line.

YEARLY MAINTENANCE OF PAY PLAN:

- It is important to maintain the pay plan by monitoring the regional rates of growth. Increase both salaries and salary ranges annually with Cost of Living Adjustments (COLAs) based on a weighted average of the Employment Cost Index (ECI) and Consumer Price Index (CPI) from the Bureau of Labor Statistics—weighted heavier toward which ever index shows greater growth.
- In addition to a yearly COLA, conduct annual employee performance appraisals with the opportunity for each employee to earn pay increases of 5% (of the midpoint for each grade) based on performance with a goal to have those employees who "meet expectations" to reach the salary range **midpoint** by the 5-year point.

DELIVERABLES

The Archer Company, LLC has conducted a compensation and pay classification study for the City of XXXXXX (the “City”) which includes the delivery of the following products:

1. Report narrative containing methodology and procedures for preparing updated classification and compensation plan
2. Market survey and recommendations
3. Updated Pay Classification and Compensation Structure
4. Updated Salary Schedules
5. Recommendations for implementation and maintenance of the system

OBJECTIVES

- To determine the relative worth of every job in the organization in accordance with the degree of difficulty or complexity associated with each job, i.e., to establish internal equity.
- To provide an equitable system wherein the degree of difficulty or complexity of every job in the organization would be evaluated against the same set of universal criteria.
- To provide an objective basis for classifying each job in the organization in accordance with its degree of difficulty or complexity. This classification system arranges the jobs in the City in hierarchical order.
- To determine the competitive worth of every job in the organization in accordance with customized wage and salary survey data in order to establish external equity in the organization's pay structure.
- To provide the framework necessary to correlate job evaluation data (internal equity) with wage & salary survey data (external equity) for the purpose of developing a pay structure that will be both fair and competitive in the market within which the City competes for talent.
- To provide a valid and reliable basis for adherence to legal and statutory regulations, e.g., Fair Labor Standards Act (FLSA), Equal Pay Act of 1963, Title 7, of the Civil Rights Act of 1964, as amended with the American with Disabilities Act of 1991, etc.

APPROACH AND METHODOLOGY

Job Analysis

The City of XXXXXX asked the Archer Company to construct a pay plan and salary schedule and to determine where the City stood in the current labor market in which it competes for its labor supply. To conduct the update, we began a review of each of the positions in the City, via job descriptions and/or Comprehensive Position Questionnaires (CPQs), to verify the scope of responsibility and the major job functions associated with each job. Our job analysis review process included a comprehensive analysis of the data and information that was provided by the City including organization charts of the city as a whole and each department.

Job Evaluation

We administered the *Archer Factor-Analysis Job Evaluation System* to measure the level of complexity associated with the content of each job, to determine the relative worth of each job within the City, to insure internal equity in the City's pay structure and to ensure a valid and reliable compensation plan for the City. Management was asked to review a preliminary list of pay grades representing all the different jobs for the purpose of providing the Archer Company with management input regarding their opinion as to the face validity of the outcomes. Market survey

data was used to validate the level of complexity for those positions that were selected as benchmarks for the study.

The Archer Factor-Analysis Job Evaluation System covered the following job content factors and criteria in the evaluation of each job:

Job Function Requirements

- Information Processing
- People Relationships
- Technology Applications

Responsibility Requirements

- Supervisory Control
- Horizon Planning
- Budgetary Allocation

Job Environment Requirements

- Working Conditions

Aptitude Requirements

- Vocabulary Skill
- Quantitative Skill
- Procedural Judgment Skill
- Contingency Judgment Skill
- Physical Adroitness Skill
- Physical Strength Skill
- Job Sensory Skill
- Experience Derived Job Skill
- Academically Derived Job Skill

Job evaluations based on the job-related criteria associated with the foregoing factors provided a quantitative score for each job. The score determined for each job represented a measure of the degree of complexity, or the level of difficulty, associated with the particular job. The scores were also used to establish or confirm the grade level for each job. Different jobs with the same or similar scores were grouped into the same pay grade indicating, that although different in content, they were equal in complexity.

Wage and Salary Survey

The Archer Company identified benchmark jobs in cooperation with the City of XXXXXXX's Human Resources Study Team for the conduction of the wage and salary survey. The number and type of benchmarks selected were sufficiently broad to ensure adequate representation of all jobs within the City. The Archer Company and the City worked together to define a profile of the labor market in which the City competes for its labor supply, to include not only the municipalities that are contiguous or most comparable to the City but also other similar entities. Data was gathered and analyzed to determine the City's competitive position in the various labor markets in which it competes for its labor supply (an external equity consideration).

The purpose of the wage and salary survey and the subsequent analysis was designed to determine the competitive worth of each job for the purpose of establishing an equitable, comparable, and competitive *pay range* for each of the jobs in the City. For purposes of validating the findings of the survey, we identified and obtained published salary surveys, gathered data from municipalities and accessed data from public records within the targeted labor market. We analyzed the salary survey data and compiled average market rates for the benchmark jobs.

The survey comparables included the cities of AAAAAA, BBBB, CCCCCC, DDDDDD, EEEEE, FFFFF, and GGGGGGGG. Certain benchmarks were verified by a

survey conducted through a professional utility organization and a small sampling of benchmarks were verified using private data from the Economic Research Institute survey. A summary of the market data is shown in *Exhibits 4 and 5*.

Pay Plan Development

We developed a pay plan for the City by statistically correlating the measure of internal equity (job evaluation points) with the external competitiveness data (average market rates) for each benchmark job. This was accomplished by using statistical regression analysis. The equation resulting from the linear regression served as the foundation for deriving the City's pay structure including the pay grade for each job and its associated pay range. The "line-of-best-fit" determined from the integration of the two sets of data defined the relationship that was pertinent to the development of a valid, reliable, effective, legally defensible, and competitive pay structure for the City's jobs.

It is recommended that each employee be brought up to the minimum of the pay range for his or her grade as quickly as is economically feasible, and that tenured employees are treated fairly with respect to seniority to avoid salary compression issues. It is recommended that each individual employee is placed into the new pay range at a tenure-based position to avoid compression 5% of midpoint for the respective grade per year up to midpoint for that grade.

We reviewed the *Fair Labor Standards Act (FLSA)* and other applicable regulatory requirements. This information was used to update the City's data base.

Recommendations and Implementation

We have submitted conclusions and recommendations for the new pay plan as contained in this report. These recommendations can be used to develop cost estimates of one or more implementation alternatives as influenced by budgetary considerations and/or requests by the City.

The following paragraphs point to the exhibits contained in this report and refer to the findings and recommendations of the study.

Exhibit 1 is a Master List of the current job titles, employee names and employee current salary. *Exhibit 2* shows the City's jobs listed in grade order with the recommended grade and annual salary range provided for each job title based on 2080 hours. (Employees who work schedules other than the typical 40-hour work week will have annual salaries that reflect the hourly rate multiplied by the hours worked.) Recommended FLSA (Fair Labor Standards Act) category indicators are shown in *Exhibit 2*. *Exhibit 3* shows the City jobs listed alphabetically with recommended pay grade and annual salary range (based on 40-hour work weeks) provided for each job title.

Utilizing data derived from the wage and salary survey and from the job evaluation process, selected benchmark averages were regressed against appropriate job evaluation points for the purpose of determining the proper pay structure for the City. *Exhibit 4* shows the benchmark averages and the corresponding evaluation points with graphics provided in the following exhibit. *Exhibit 5* shows the graphic results of the *regression analysis* as derived from the slope and intercept of the "line of best fit" to the salary survey data and *Exhibit 6*, the second step, shows the graphic representation of

the proposed salary structure. *Exhibit 7* shows the recommended pay schedules determined as a result of the regression analysis.

The pay schedules, *Exhibit 7*, as prepared for the City, are based on a fixed dollar increase from one grade to the next. This fixed-dollar progression, rather than a percentage increase progression, provides for consistency and fairness. Each successive pay grade has an **assigned pay range**. Each pay range is broken into a **minimum** value, a **midpoint** value and a **maximum** value. The midpoint of the pay range represents the value derived from the average of the wage and salary survey study results conducted by the Archer Company. The minimum is **25** percent **below** the midpoint of the pay range and the maximum of the pay range is **50** percent **above** the minimum of the pay range.

To find the recommended pay range for any job in the City, first look for the job title on *Exhibit 2* (point order listing) or *Exhibit 3* (alphabetical listing) and note the grade belonging to the particular job. Second, utilize the pay schedules (*Exhibit 7*) to determine the pay grade and pay range into which the job falls. All jobs with the same recommended pay grades have been grouped together in *Exhibit 8*. Each grouping, according to pay grade, represents a separate grade classification for the City.

The pay grade itself represents a way of defining the relative value of each job to the City. Theoretically, all jobs with the same pay grade are of the same **relative value** to the City. Accordingly, jobs with higher pay grades are of greater relative value to the City and, therefore, have higher pay ranges than those with lower pay grades.

It is recommended that each employee be brought up to the minimum of the pay range for his or her grade as quickly as is economically feasible (*Exhibit 9*). Merit increases (based on performance) would be in addition to this adjustment to the newly adjusted pay ranges. For each experienced employee whose performance regularly meets the expectations of the City, but whose current pay is below the recommended midpoint of their respective pay range, it is suggested that their pay be adjusted toward the midpoint of the recommended pay range as quickly as is economically feasible. Employees who have been in their position for at least a year should be brought toward the midpoint based on the time in their current position. This recommendation is based on the premise that the focus for implementation of the study should be on the **recommended midpoint**. The midpoint for each recommended pay range represents a market based competitive figure, adjusted for internal equity, that might be necessary to retain a fully experienced and capable employee whose performance is consistently meeting the City's expectations.

We do not recommend reducing any current salaries based on this study. The integrity of the pay plan can be achieved over time by enforcing the maximum going forward. The ranges are expected to increase by the Cost of Living Adjustments each year, so those salaries above the range will eventually fall in line.

The acceptance of the findings and recommendations of the Archer Company's study by the City Council will be the concluding step in the study and report process. The Archer Company offers services to keep the City's compensation plan maintained and in up-to-date competitive form. These services are included for one year from the completion of the study.

Summary

Course of Action:

1. Bring all employees to appropriate salary level based on Market Rate (Salary Range Midpoint) using tenure (time in position) to place each employee in the appropriate place in the range. (*Exhibit 9*). If necessary, this adjustment can be done in phases:
 - a. Option 1. Bring all employees into the new pay ranges (at least to the minimum).
 - b. Option 2. Place all City of XXXXXX employees into new pay ranges using tenure to place each employee at the appropriate rate based on years in the current position—5% of midpoint for their grade per year in the current position (up to five years).
2. Merit increases based on performance with a goal to have those employees who “meet expectations” to reach the salary range **midpoint** at the 5-year point.
3. Maintenance of Pay Plan for future years:
 - a. Increase both salaries and salary ranges annually with Cost of Living Adjustments (COLAs) based on a weighted average of the ECI and CPI from the Bureau of Labor Statistics--weighted heavier toward which ever index is greater. It is important to maintain the pay plan by monitoring the regional rates of growth. Prior to the pandemic the recommended COLA had been 0-2.9% based on the previous year's increase of the indices year-over-year.
 - b. Merit Pay Increases based on performance (0-5% per year). In addition to a yearly COLA, conduct annual employee performance appraisals with the opportunity for each employee to earn pay increases of 5% (of the midpoint for each grade) based on performance with a goal to have those employees who “meet expectations” to reach the salary range **midpoint** by the 5-year point.

Exhibit 1

CITY OF XXXXXX, Xxxxxxxx
CLASSIFICATION AND COMPENSATION
MASTER LIST

DEPT	DIV	EMPLOYEE	CURRENT JOB TITLE	CURRENT SALARY	PROPOSED JOB CODE
1000 ADMINI & MUNICIPAL COURT					
		40 HOURS PER WEEK			
			ADMINISTRATIVE ASSISTANT	48,000	1003
			COURT CLERK	35,713	1006
			ASST DIRECTOR-GENERAL ADMINIST	53,352	1002
			COURT CLERK	33,966	1006
			COURT CLERK	46,321	1005
			DIRECTOR-CITY CLERK	65,624	1001
2000 FINANCE					
		40 HOURS PER WEEK			
			CLERK	32,843	2004
			SENIOR ACCOUNTING CLERK	70,574	2003
			CLERK	41,600	2004
			FINANCE DIRECTOR	107,515	2001
			CLERK	40,476	2004
			ASSISTANT DIRECTOR	85,737	2002
3000 POLICE & 911					
		40 HOURS PER WEEK			
			SECRETARY	50,128	3003
			PATROL	20,644	3010
			PATROL	20,644	3010
			DEPUTY CHIEF OF POLICE	85,995	3002
			PATROL	20,644	3010
			DIRECTOR - POLICE CHIEF	109,074	3001
3000.12 POLICE & 911					
		12 -HOUR SHIFTS			
			PATROL OFFICER	53,452	3007
			POLICE SERGEANT	69,454	3006
			PATROL OFFICER-FULL TIME	59,413	3010
			POLICE SERGEANT	66,620	3008
			LT. CID	76,026	3005
			JAILER	53,452	3008
			JAILER	51,913	3010
			CAPTAIN POSITION	79,177	3004
			COMMUNICATIONS OFFICER	48,493	3010
			JAILER	61,514	3011
			PATROL OFFICER	66,156	3008
			JAIL OFFICER	48,089	3012
			JAILER	51,913	3010
			DETENTION JAIL	48,640	3012
			JAIL OFFICER	58,949	3012
			PATROL OFFICER-FULL TIME	50,912	3010
			JAILER	53,965	3010
			POLICE SERGEANT-CMVS UNIT SUPE	84,210	3008
			PATROL OFFICER-FULL TIME	50,608	3008
		VACANT, D	INVESTIGATION OFFICER - CID	0	3009
		VACANT, E	INVESTIGATION OFFICER - CID	0	3009
		VACANT, F	PATROL OFFICER	0	3010
		VACANT, G	PATROL OFFICER	0	3010
		VACANT, H	JAILER	0	3012
		3000.911 POLICE & 911	FULL TIME JAILER 100 3226	64,861	3008

12 -HR SHIFTS; COMM (E-911)

CITY OF XXXXXX, Xxxxxxxx
CLASSIFICATION AND COMPENSATION
MASTER LIST

DEPT	DIV	EMPLOYEE	CURRENT JOB TITLE	CURRENT SALARY	PROPOSED JOB CODE
3000.911 POLICE & 911					
			COMMUNICATIONS SUPERVISOR	57,018	3013
			COMMUNICATIONS DISPATCH	36,424	3014
			COMMUNICATIONS OFFICER	38,235	3014
			COMMUNICATIONS OFFICER	41,790	3014
			COMMUNICATIONS OFFICER	38,235	3014
		VACANT, A	COMMUNICATIONS OFFICER	0	3014
		VACANT, B	COMMUNICATIONS OFFICER	0	3014
		VACANT, C	COMMUNICATIONS OFFICER	0	3014
4000 FIRE & EMERGENCY SERVICES					
40 HOURS PER WEEK					
			FIREFIGHTER	58,448	4007
			FIRE CHIEF	96,200	4001
			ASST FIRE CHIEF	80,080	4002
		VACANT, I	ADMIN ASST - FIRE	0	4003
		VACANT, K	(NEW POSITION)	0	4004
4000.24 FIRE & EMERGENCY SERVICES					
24 ON 48 OFF; FIRE ROATATION					
			FIRE FIGHTER	75,241	4005
			FIREFIGHTER	68,474	4010
			FIREFIGHTER	57,999	4010
			FULL TIME FIREFIGHTER	54,507	4010
			LIEUTENANT - FIREFIGHTER	67,547	4010
			FIREFIGHTER	53,549	4011
			FIREFIGHTER	49,501	4012
			FIRE FIGHTER	51,417	4011
			FIREMAN	62,356	4010
			FIREFIGHTER	73,449	4005
			FIREFIGHTER	54,507	4010
			FIREFIGHTER	49,501	4012
			FULL TIME FIREFIGHTER	68,010	4006
			FIREMAN	68,010	4006
		VACANT, J	(NEW POSITION)	0	4008
			CAPTAIN - FIREFIGHTER	86,180	4005
			AEMT FIREFIGHTER	64,364	4006
5000 PUBLIC WORKS					
40 HOURS PER WEEK					
			MECHANIC	38,459	5009
			FULL TIME MAINT WORKER	36,275	5013
			MAINTENANCE WORKER	28,080	5015
			MAINTENANCE WORKER 1	29,640	5015
			ADMINISTRATIVE SPECIALIST	32,760	5010
			MAINTENANCE WORKER 1	37,668	5005
			WATER MAINTENANCE WORKER 1	43,659	5006
			MAINTENANCE WORKER	32,323	5015
			DIRECTOR - PUBLIC WORKS	91,416	5001
			MAINTENANCE WORKER	32,323	5015
			ASSISTANT DIRECTOR	85,196	5002
			CITY MECHANIC	47,403	5007
			MAINENANCE WORKER I STREETS	30,513	5012
			ADMINISTRATIVE SPECIALIST	34,923	5008
			WATER & SEWER CREW LEADER	81,286	5004
			MAINTENANCE WORK I/CDL	35,942	5013
			MAINTENANCE WORKER I	39,395	5013

CITY OF XXXXXX, XXXXXXXX
CLASSIFICATION AND COMPENSATION
MASTER LIST

DEPT	DIV	EMPLOYEE	CURRENT JOB TITLE	CURRENT SALARY	PROPOSED JOB CODE
5000 PUBLIC WORKS					
			WATER MAINTENANCE WORKER 1	34,486	5014
			WATER MAINTENANCE WORKER 1	30,950	5014
			WATER & SEWER SUPERVISOR	32,323	5014
			MAINTENANCE WORKER I CDL	37,835	5012
			MAINTANANCE I	36,275	5015
			(NEW POSITION)	0	5003
			MAINT. WORKER III/CDL	39,894	5012
			MAINTENANCE WORKER I CDL	17,825	5013
6000 COMM AFF & PARKS & REC					
			40 HOURS PER WEEK		
			JANITORIAL	36,628	6022
			PARKS MAINTENANCE	28,392	6024
			CLERK	38,459	6019
			PARKS SUPERVISOR	48,152	6009
			MAINTENANCE WORKER	40,768	6018
			CARPENTER	38,459	6017
			DIRECTOR - COMMUNITY AFFAIRS	99,382	6001
			PARKS MAINTENANCE	25,105	6024
			CREW LEADER/LANDSCAPE FOREMAN	41,579	6020
			MAINTANANCE I	32,115	6024
			IT SPECIALIST	40,144	6011
			PARKS MAINTENANCE	30,513	6021
			BLDG PERMIT & INSPECT COOR	41,600	6010
			DEVELOPMENT CLERK	36,628	6019
			PARKS MAINTENANCE	25,105	6024
			PARKS MAINTENANCE	30,513	6024
			CHIEF SUPERVISOR OF BLDG & PAR	59,113	6008
			HVAC TECH	50,856	6015
			PARKS MAINTENANCE	25,105	6024
			(NEW POSITION)	0	6007
			PLANNING & ZONING	79,934	6002

Exhibit 2

CITY OF XXXXXX, Xxxxxxxx
CLASSIFICATION AND COMPENSATION
JOB CLASSIFICATIONS BY JOB CODE

CODE	TITLE	FLSA	PAY GRADE	ANNUAL SALARY RANGE (2080 HOURS)		
				MINIMUM	MID-POINT	MAXIMUM
1001	DIRECTOR - ADMIN & HR / CITY CLERK	E	33	60,534	75,668	90,801
1002	HR MANAGER / ASST DIR - ADMIN /	E	29	54,248	67,810	81,372
1003	EXECUTIVE ASSISTANT	N	20	40,103	50,129	60,155
1005	CHIEF CLERK - MUNICIPAL COURT	N	18	36,960	46,200	55,440
1006	CLERK - MUNICIPAL COURT	N	13	29,102	36,378	43,653
2001	DIRECTOR - FINANCE	E	41	73,107	91,384	109,661
2002	ASST DIR - FINANCE	E	35	63,677	79,597	95,516
2003	SENIOR CLERK - ACCOUNTING	N	18	36,960	46,200	55,440
2004	CLERK - ACCOUNTING	N	13	29,102	36,378	43,653
3001	DIRECTOR - POLICE CHIEF	E	44	77,822	97,277	116,733
3002	DEPUTY CHIEF OF POLICE	E	40	71,535	89,419	107,303
3003	SECRETARY (POLICE)	N	14	30,674	38,342	46,011
3004	CAPTAIN - POLICE	N	33	60,534	75,668	90,801
3005	LIEUTENANT - CID	N	26	49,533	61,916	74,300
3006	LIEUTENANT - PATROL	N	26	49,533	61,916	74,300
3007	SERGEANT - POLICE DETECTIVE	N	22	43,246	54,058	64,870
3008	SERGEANT - POLICE	N	22	43,246	54,058	64,870
3009	INVESTIGATION OFFICER - CID	N	18	36,960	46,200	55,440
3010	PATROL OFFICER	N	18	36,960	46,200	55,440
3011	EVIDENCE / OPEN RECORDS TECH	N	18	36,960	46,200	55,440
3012	DETENTION / TRANSPORT OFFICER	N	15	32,245	40,307	48,368
3013	SUPERVISOR - COMMUNICATIONS (E-911)	N	24	46,390	57,987	69,585
3014	COMMUNICATIONS OFFICER (E-911)	N	14	30,674	38,342	46,011
4001	DIRECTOR - FIRE CHIEF	E	43	76,250	95,313	114,375
4002	ASST FIRE CHIEF	E	36	65,249	81,561	97,874
4003	ADMIN ASST - FIRE	N	14	30,674	38,342	46,011
4004	FIRE TRAINING OFFICER	E	24	46,390	57,987	69,585
4005	CAPTAIN - FIREFIGHTER	N	25	47,961	59,952	71,942
4006	LIEUTENANT - FIREFIGHTER	N	22	43,246	54,058	64,870
4007	DEPUTY FIRE MARSHALL	N	24	46,390	57,987	69,585
4008	SUPERVISOR - EMS	N	20	40,103	50,129	60,155
4010	FIREFIGHTER / EMT III (DRIVER	N	17	35,388	44,236	53,083
4011	FIREFIGHTER / EMT II	N	15	32,245	40,307	48,368
4012	FIREFIGHTER / EMT I	N	13	29,102	36,378	43,653
5001	DIRECTOR - PUBLIC WORKS	E	40	71,535	89,419	107,303
5002	ASST DIR - PUBLIC WORKS	E	36	65,249	81,561	97,874
5003	DIV MANAGER - STORM WATER	N	21	41,675	52,094	62,512
5004	DIV MANAGER - SEWER	N	21	41,675	52,094	62,512
5005	DIV MANAGER - STREETS	N	21	41,675	52,094	62,512
5006	DIV MANAGER - WATER	N	21	41,675	52,094	62,512
5007	CITY MECHANIC	N	19	38,532	48,165	57,798
5008	ADMIN ASST - TO DIV MGRS OF WATER	N	18	36,960	46,200	55,440
5009	ASST MECHANIC	N	16	33,817	42,271	50,725
5010	ADMIN SPEC - PW	N	15	32,245	40,307	48,368
5011	CREW LEADER - WATER & SEWER	N	12	27,530	34,413	41,296
5012	CREW LEADER - STREETS	N	11	25,959	32,449	38,938
5013	MAINT WORKER / CDL- STREETS	N	11	25,959	32,449	38,938
5014	MAINT WORKER - WATER	N	10	24,387	30,484	36,581
5015	MAINT WORKER - STREETS	N	9	22,816	28,520	34,224
6001	DIRECTOR - COMMUNITY AFFAIRS	E	40	71,535	89,419	107,303
6002	ASST DIR - COMMUNITY AFFAIRS	E	35	63,677	79,597	95,516
6007	MANAGER - PARKS, REC & BLDG MAINT	N	27	51,104	63,881	76,657

CITY OF XXXXXX, XXXXXXXX
CLASSIFICATION AND COMPENSATION
JOB CLASSIFICATIONS BY OCCUPATION CODE, JOB
CODE

CODE	TITLE	FLSA	PAY GRADE	ANNUAL SALARY RANGE (2080 HOURS)		
				MINIMUM	MID-POINT	MAXIMUM
6008	CHIEF SUPV - BLDG & PARKS MAINT	N	20	40,103	50,129	60,155
6009	SUPERVISOR - PARKS MAINT	N	20	40,103	50,129	60,155
6010	BLDG PERMIT & INSPECT COOR	N	19	38,532	48,165	57,798
6011	CODE ENFORCEMENT COOR	N	18	36,960	46,200	55,440
6015	HVAC / BLDG MAINT TECH	N	17	35,388	44,236	53,083
6016	CODE ENFORCEMENT OFFICER	N	15	32,245	40,307	48,368
6017	CARPENTER - BLDG MAINT TECH	N	14	30,674	38,342	46,011
6018	BUILDING MAINTENANCE TECHNICIAN	N	13	29,102	36,378	43,653
6019	CLERK - COMMUNITY DEVELOPMENT	N	13	29,102	36,378	43,653
6020	FOREMAN / CDL - PARKS LANDSCAPE	N	12	27,530	34,413	41,296
6021	CREW LEADER / EQUIP OP - PARKS	N	11	25,959	32,449	38,938
6022	JANITORIAL WORKER	N	9	22,816	28,520	34,224
6024	MAINT WORKER - PARKS	N	9	22,816	28,520	34,224

Exhibit 3

**CITY OF XXXXXX, XXXXXXXX CLASSIFICATION
AND COMPENSATION
JOB CLASSIFICATIONS BY JOB TITLE, GRADE**

CODE	TITLE	FLSA	PAY GRADE	ANNUAL SALARY RANGE (2080 HOURS)		
				MINIMUM	MID-POINT	MAXIMUM
A						
5008	ADMIN ASST - TO DIV MGRS OF WATER	N	18	36,960	46,200	55,440
4003	ADMIN ASST - FIRE	N	14	30,674	38,342	46,011
5010	ADMIN SPEC - PW	N	15	32,245	40,307	48,368
6002	ASST DIR - COMMUNITY AFFAIRS	E	35	63,677	79,597	95,516
2002	ASST DIR - FINANCE	E	35	63,677	79,597	95,516
5002	ASST DIR - PUBLIC WORKS	E	36	65,249	81,561	97,874
4002	ASST FIRE CHIEF	E	36	65,249	81,561	97,874
5009	ASST MECHANIC	N	16	33,817	42,271	50,725
B						
6010	BLDG PERMIT & INSPECT COOR	N	19	38,532	48,165	57,798
6018	BUILDING MAINTENANCE TECHNICIAN	N	13	29,102	36,378	43,653
C						
4005	CAPTAIN - FIREFIGHTER	N	25	47,961	59,952	71,942
3004	CAPTAIN - POLICE	N	33	60,534	75,668	90,801
6017	CARPENTER - BLDG MAINT TECH	N	14	30,674	38,342	46,011
1005	CHIEF CLERK - MUNICIPAL COURT	N	18	36,960	46,200	55,440
6008	CHIEF SUPV - BLDG & PARKS MAINT	N	20	40,103	50,129	60,155
5007	CITY MECHANIC	N	19	38,532	48,165	57,798
2004	CLERK - ACCOUNTING	N	13	29,102	36,378	43,653
6019	CLERK - COMMUNITY DEVELOPMENT	N	13	29,102	36,378	43,653
1006	CLERK - MUNICIPAL COURT	N	13	29,102	36,378	43,653
6011	CODE ENFORCEMENT COOR	N	18	36,960	46,200	55,440
6016	CODE ENFORCEMENT OFFICER	N	15	32,245	40,307	48,368
3014	COMMUNICATIONS OFFICER (E-911)	N	14	30,674	38,342	46,011
5012	CREW LEADER - STREETS	N	11	25,959	32,449	38,938
5011	CREW LEADER - WATER & SEWER	N	12	27,530	34,413	41,296
6021	CREW LEADER / EQUIP OP - PARKS	N	11	25,959	32,449	38,938
D						
3002	DEPUTY CHIEF OF POLICE	E	40	71,535	89,419	107,303
4007	DEPUTY FIRE MARSHALL	N	24	46,390	57,987	69,585
3012	DETENTION / TRANSPORT OFFICER	N	15	32,245	40,307	48,368
1001	DIRECTOR - ADMIN & HR / CITY CLERK	E	33	60,534	75,668	90,801
6001	DIRECTOR - COMMUNITY AFFAIRS	E	40	71,535	89,419	107,303
2001	DIRECTOR - FINANCE	E	41	73,107	91,384	109,661
4001	DIRECTOR - FIRE CHIEF	E	43	76,250	95,313	114,375
3001	DIRECTOR - POLICE CHIEF	E	44	77,822	97,277	116,733
5001	DIRECTOR - PUBLIC WORKS	E	40	71,535	89,419	107,303
5004	DIV MANAGER - SEWER	N	21	41,675	52,094	62,512
5003	DIV MANAGER - STORM WATER	N	21	41,675	52,094	62,512
5005	DIV MANAGER - STREETS	N	21	41,675	52,094	62,512
5006	DIV MANAGER - WATER	N	21	41,675	52,094	62,512
E						
3011	EVIDENCE / OPEN RECORDS TECH	N	18	36,960	46,200	55,440
1003	EXECUTIVE ASSISTANT	N	20	40,103	50,129	60,155
F						
4004	FIRE TRAINING OFFICER	E	24	46,390	57,987	69,585
4012	FIREFIGHTER / EMT I	N	13	29,102	36,378	43,653
4011	FIREFIGHTER / EMT II	N	15	32,245	40,307	48,368
4010	FIREFIGHTER / EMT III (DRIVER	N	17	35,388	44,236	53,083
6020	FOREMAN / CDL - PARKS LANDSCAPE	N	12	27,530	34,413	41,296
H						
1002	HR MANAGER / ASST DIR - ADMIN /	E	29	54,248	67,810	81,372
6015	HVAC / BLDG MAINT TECH	N	17	35,388	44,236	53,083

**CITY OF XXXXXX, XXXXXXXX CLASSIFICATION
AND COMPENSATION
JOB CLASSIFICATIONS BY JOB TITLE, GRADE**

CODE	TITLE	FLSA	PAY GRADE	ANNUAL SALARY RANGE (2080 HOURS)		
				MINIMUM	MID-POINT	MAXIMUM
I						
3009	INVESTIGATION OFFICER - CID	N	18	36,960	46,200	55,440
J						
6022	JANITORIAL WORKER	N	9	22,816	28,520	34,224
L						
3005	LIEUTENANT - CID	N	26	49,533	61,916	74,300
4006	LIEUTENANT - FIREFIGHTER	N	22	43,246	54,058	64,870
3006	LIEUTENANT - PATROL	N	26	49,533	61,916	74,300
M						
6024	MAINT WORKER - PARKS	N	9	22,816	28,520	34,224
5015	MAINT WORKER - STREETS	N	9	22,816	28,520	34,224
5014	MAINT WORKER - WATER	N	10	24,387	30,484	36,581
5013	MAINT WORKER / CDL- STREETS	N	11	25,959	32,449	38,938
6007	MANAGER - PARKS, REC & BLDG MAINT	N	27	51,104	63,881	76,657
P						
3010	PATROL OFFICER	N	18	36,960	46,200	55,440
S						
3003	SECRETARY (POLICE)	N	14	30,674	38,342	46,011
2003	SENIOR CLERK - ACCOUNTING	N	18	36,960	46,200	55,440
3008	SERGEANT - POLICE	N	22	43,246	54,058	64,870
3007	SERGEANT - POLICE DETECTIVE	N	22	43,246	54,058	64,870
3013	SUPERVISOR - COMMUNICATIONS (E-911)	N	24	46,390	57,987	69,585
4008	SUPERVISOR - EMS	N	20	40,103	50,129	60,155
6009	SUPERVISOR - PARKS MAINT	N	20	40,103	50,129	60,155

Exhibit 4

CITY OF XXXXXX, XXXXXXXX
CLASSIFICATION AND COMPENSATION
REGRESSION ANALYSIS

Number of Jobs in Analysis :	34	Correlation :	0.959270	Alpha :	5928.1738417
Degrees of Freedom :	32	R Squared :	0.920199	Beta :	78.5803487
		Error of Estimation :	6281.29		

SELECTED JOB EVALUATIONS

JOB CODE	JOB TITLE	EVAL POINTS	SURVEY
6024	MAINT WORKER - PARKS	296	33,904
5014	MAINT WORKER - WATER	300	36,861
2004	CLERK - ACCOUNTING	384	41,587
4012	FIREFIGHTER / EMT I	395	37,548
1006	CLERK - MUNICIPAL COURT	396	39,489
6018	BUILDING MAINTENANCE TECHNICIAN	398	42,016
4003	ADMIN ASST - FIRE	400	44,760
3014	COMMUNICATIONS OFFICER (E-911)	416	43,695
4010	FIREFIGHTER / EMT III (DRIVER ENGINEER)	498	43,039
3010	PATROL OFFICER	508	51,831
6011	CODE ENFORCEMENT COOR	520	46,647
5007	CITY MECHANIC	537	52,535
6010	BLDG PERMIT & INSPECT COOR	540	44,504
1003	EXECUTIVE ASSISTANT	556	54,998
6009	SUPERVISOR - PARKS MAINT	566	53,794
6008	CHIEF SUPV - BLDG & PARKS MAINT	571	62,414
3008	SERGEANT - POLICE	621	61,886
3013	SUPERVISOR - COMMUNICATIONS (E-911)	653	63,245
4004	FIRE TRAINING OFFICER	657	68,337
4005	CAPTAIN - FIREFIGHTER	682	50,439
3005	LIEUTENANT - CID	719	69,928
1002	HR MANAGER / ASST DIR - ADMIN / DEPUTY CITY	783	58,465
3004	CAPTAIN - POLICE	884	78,825
1001	DIRECTOR - ADMIN & HR / CITY CLERK	887	78,568
2002	ASST DIR - FINANCE	930	78,098
6002	ASST DIR - COMMUNITY AFFAIRS	940	71,891
5002	ASST DIR - PUBLIC WORKS	954	75,714
4002	ASST FIRE CHIEF	962	93,070
3002	DEPUTY CHIEF OF POLICE	1,050	95,442
5001	DIRECTOR - PUBLIC WORKS	1,050	108,805
6001	DIRECTOR - COMMUNITY AFFAIRS	1,073	95,187
2001	DIRECTOR - FINANCE	1,080	100,357
4001	DIRECTOR - FIRE CHIEF	1,146	113,432
3001	DIRECTOR - POLICE CHIEF	1,163	112,302

Exhibits 5&6

Exhibit 5. Graph of Statistical Regression of Job Evaluation Points with Salary Survey Data

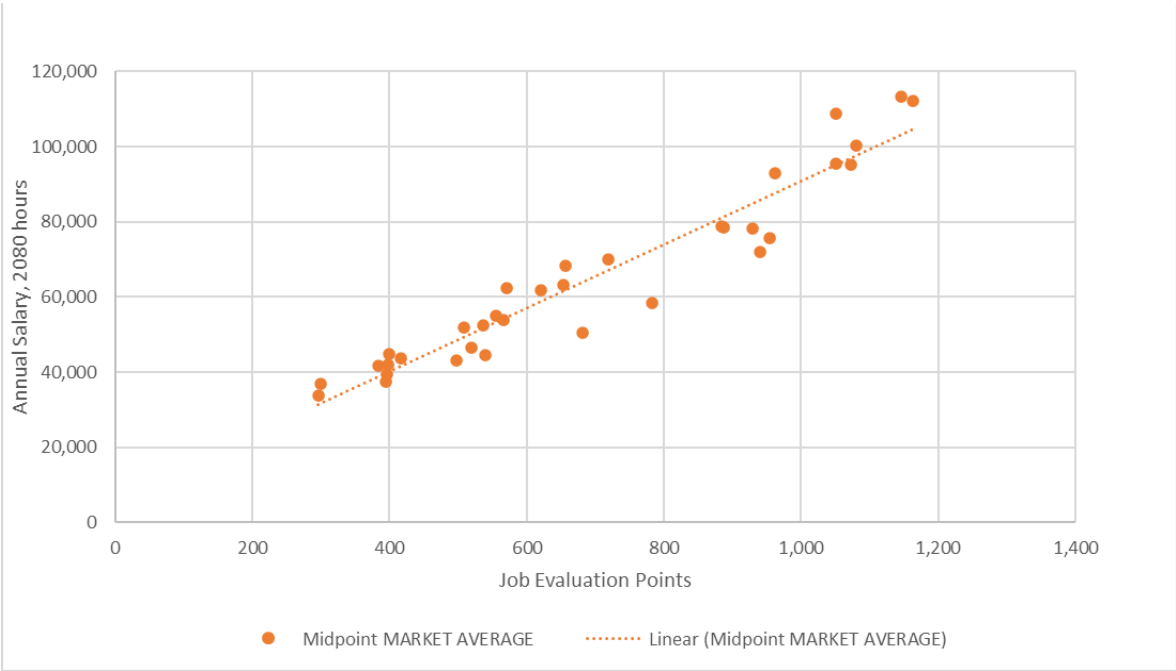


Exhibit 6. Graph of Pay Plan Salary Structure Resulting from Market Data

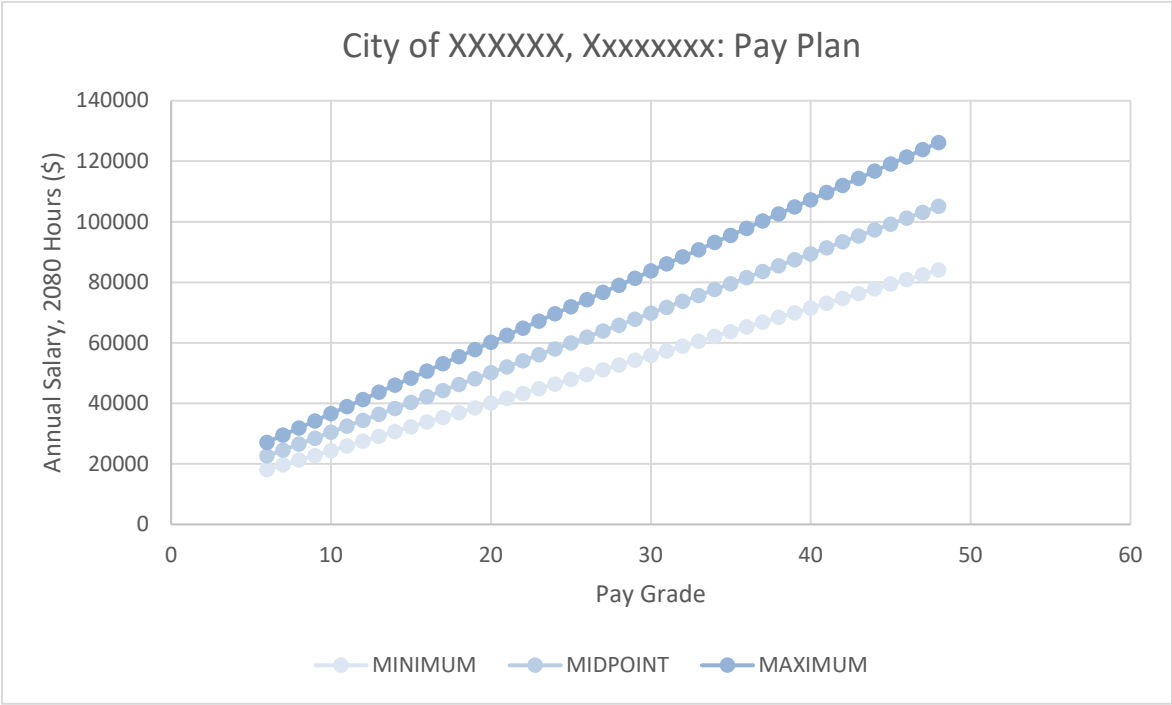


Exhibit 7

CITY OF XXXXXX, Xxxxxxxx
CLASSIFICATION AND COMPENSATION
PAY GRADE LIST

PAY PLAN: REGULAR

PAY GRADE	EVALUATION POINTS RANGE		ANNUAL SALARY RANGE		
	FROM	TO	MINIMUM	MID-POINT	MAXIMUM
6	200	224	18,101	22,626	27,151
7	225	249	19,672	24,591	29,509
8	250	274	21,244	26,555	31,866
9	275	299	22,816	28,520	34,224
10	300	324	24,387	30,484	36,581
11	325	349	25,959	32,449	38,938
12	350	374	27,530	34,413	41,296
13	375	399	29,102	36,378	43,653
14	400	424	30,674	38,342	46,011
15	425	449	32,245	40,307	48,368
16	450	474	33,817	42,271	50,725
17	475	499	35,388	44,236	53,083
18	500	524	36,960	46,200	55,440
19	525	549	38,532	48,165	57,798
20	550	574	40,103	50,129	60,155
21	575	599	41,675	52,094	62,512
22	600	624	43,246	54,058	64,870
23	625	649	44,818	56,023	67,227
24	650	674	46,390	57,987	69,585
25	675	699	47,961	59,952	71,942
26	700	724	49,533	61,916	74,300
27	725	749	51,104	63,881	76,657
28	750	774	52,676	65,845	79,014
29	775	799	54,248	67,810	81,372
30	800	824	55,819	69,774	83,729
31	825	849	57,391	71,739	86,087
32	850	874	58,962	73,703	88,444
33	875	899	60,534	75,668	90,801
34	900	924	62,106	77,632	93,159
35	925	949	63,677	79,597	95,516
36	950	974	65,249	81,561	97,874
37	975	999	66,821	83,526	100,231
38	1,000	1,024	68,392	85,490	102,588
39	1,025	1,049	69,964	87,455	104,946
40	1,050	1,074	71,535	89,419	107,303
41	1,075	1,099	73,107	91,384	109,661
42	1,100	1,124	74,679	93,348	112,018
43	1,125	1,149	76,250	95,313	114,375
44	1,150	1,174	77,822	97,277	116,733
45	1,175	1,199	79,393	99,242	119,090
46	1,200	1,224	80,965	101,206	121,448
47	1,225	1,249	82,537	103,171	123,805
48	1,250	1,274	84,108	105,135	126,163

Exhibit 8

CITY OF XXXXXX, Xxxxxxxx
CLASSIFICATION AND COMPENSATION
JOB CLASSIFICATIONS BY PROPOSED GRADE, JOB CODE

CODE	TITLE	FLSA	ANNUAL SALARY RANGE, 2080 HOURS		
			MINIMUM	MID-POINT	MAXIMUM
GRADE: 9			22,816	28,520	34,224
5015	MAINT WORKER - STREETS	N			
6022	JANITORIAL WORKER	N			
6024	MAINT WORKER - PARKS	N			
GRADE: 10			24,387	30,484	36,581
5014	MAINT WORKER - WATER	N			
GRADE: 11			25,959	32,449	38,938
5012	CREW LEADER - STREETS	N			
5013	MAINT WORKER / CDL- STREETS	N			
6021	CREW LEADER / EQUIP OP - PARKS	N			
GRADE: 12			27,530	34,413	41,296
5011	CREW LEADER - WATER & SEWER	N			
6020	FOREMAN / CDL - PARKS LANDSCAPE	N			
GRADE: 13			29,102	36,378	43,653
1006	CLERK - MUNICIPAL COURT	N			
2004	CLERK - ACCOUNTING	N			
4012	FIREFIGHTER / EMT I	N			
6018	BUILDING MAINTENANCE TECHNICIAN	N			
6019	CLERK - COMMUNITY DEVELOPMENT	N			
GRADE: 14			30,674	38,342	46,011
3003	SECRETARY (POLICE)	N			
3014	COMMUNICATIONS OFFICER (E-911)	N			
4003	ADMIN ASST - FIRE	N			
6017	CARPENTER - BLDG MAINT TECH	N			
GRADE: 15			32,245	40,307	48,368
3012	DETENTION / TRANSPORT OFFICER	N			
4011	FIREFIGHTER / EMT II	N			
5010	ADMIN SPEC - PW	N			
6016	CODE ENFORCEMENT OFFICER	N			
GRADE: 16			33,817	42,271	50,725
5009	ASST MECHANIC	N			
GRADE: 17			35,388	44,236	53,083
4010	FIREFIGHTER / EMT III (DRIVER	N			
6015	HVAC / BLDG MAINT TECH	N			
GRADE: 18			36,960	46,200	55,440
1005	CHIEF CLERK - MUNICIPAL COURT	N			
2003	SENIOR CLERK - ACCOUNTING	N			
3009	INVESTIGATION OFFICER - CID	N			
3010	PATROL OFFICER	N			
3011	EVIDENCE / OPEN RECORDS TECH	N			
5008	ADMIN ASST - TO DIV MGRS OF WATER &	N			
6011	CODE ENFORCEMENT COOR	N			
GRADE: 19			38,532	48,165	57,798
5007	CITY MECHANIC	N			
6010	BLDG PERMIT & INSPECT COOR	N			
GRADE: 20			40,103	50,129	60,155
1003	EXECUTIVE ASSISTANT	N			
4008	SUPERVISOR - EMS	N			
6008	CHIEF SUPV - BLDG & PARKS MAINT	N			
6009	SUPERVISOR - PARKS MAINT	N			
GRADE: 21			41,675	52,094	62,512
5003	DIV MANAGER - STORM WATER	N			
5004	DIV MANAGER - SEWER	N			

CITY OF XXXXXX, XXXXXXXX
CLASSIFICATION AND COMPENSATION
JOB CLASSIFICATIONS BY PROPOSED GRADE, JOB CODE

CODE	TITLE	FLSA	ANNUAL SALARY RANGE, 2080 HOURS		
			MINIMUM	MID-POINT	MAXIMUM
5005	DIV MANAGER - STREETS	N			
5006	DIV MANAGER - WATER	N			
GRADE: 22			43,246	54,058	64,870
3007	SERGEANT - POLICE DETECTIVE	N			
3008	SERGEANT - POLICE	N			
4006	LIEUTENANT - FIREFIGHTER	N			
GRADE: 24			46,390	57,987	69,585
3013	SUPERVISOR - COMMUNICATIONS (E-911)	N			
4004	FIRE TRAINING OFFICER	E			
4007	DEPUTY FIRE MARSHALL	N			
GRADE: 25			47,961	59,952	71,942
4005	CAPTAIN - FIREFIGHTER	N			
GRADE: 26			49,533	61,916	74,300
3005	LIEUTENANT - CID	N			
3006	LIEUTENANT - PATROL	N			
GRADE: 27			51,104	63,881	76,657
6007	MANAGER - PARKS, REC & BLDG MAINT	N			
GRADE: 29			54,248	67,810	81,372
1002	HR MANAGER / ASST DIR - ADMIN /	E			
GRADE: 33			60,534	75,668	90,801
1001	DIRECTOR - ADMIN & HR / CITY CLERK	E			
3004	CAPTAIN - POLICE	N			
GRADE: 35			63,677	79,597	95,516
2002	ASST DIR - FINANCE	E			
6002	ASST DIR - COMMUNITY AFFAIRS	E			
GRADE: 36			65,249	81,561	97,874
4002	ASST FIRE CHIEF	E			
5002	ASST DIR - PUBLIC WORKS	E			
GRADE: 40			71,535	89,419	107,303
3002	DEPUTY CHIEF OF POLICE	E			
5001	DIRECTOR - PUBLIC WORKS	E			
6001	DIRECTOR - COMMUNITY AFFAIRS	E			
GRADE: 41			73,107	91,384	109,661
2001	DIRECTOR - FINANCE	E			
GRADE: 43			76,250	95,313	114,375
4001	DIRECTOR - FIRE CHIEF	E			
GRADE: 44			77,822	97,277	116,733
3001	DIRECTOR - POLICE CHIEF	E			

Exhibit 9

CITY OF XXXXXX, XXXXXXXX
CLASSIFICATION AND COMPENSATION
DEPARTMENT INSTALLATION SCHEDULE

I

DEPARTMENT: 5000 - PUBLIC WORKS

UNIT: 40 HOURS PER WEEK

EMPLOYEE	JOB CODE AND TITLE	PAY GRADE	ANNUAL SALARY RANGE			ANNUAL SALARY	ADJUSTMENT TO	
			MINIMUM	MIDPOINT	MAXIMUM		MINIMUM	MIDPOINT
	5001 DIRECTOR - PUBLIC WORKS	40	71,535	89,419	107,303	91,416	0	0
	5002 ASST DIR - PUBLIC WORKS	36	65,249	81,561	97,874	85,196	0	0
	5003 DIV MANAGER - STORM	21	41,675	52,094	62,512	0	0	0
	5004 DIV MANAGER - SEWER	21	41,675	52,094	62,512	81,286	0	0
	5005 DIV MANAGER - STREETS	21	41,675	52,094	62,512	37,668	4,006	8,174
	5006 DIV MANAGER - WATER	21	41,675	52,094	62,512	43,659	0	2,183
	5007 CITY MECHANIC	19	38,532	48,165	57,798	47,403	0	0
	5008 ADMIN ASST - TO DIV MGRS	18	36,960	46,200	55,440	34,923	2,037	3,885
	5009 ASST MECHANIC	16	33,817	42,271	50,725	38,459	0	0
	5010 ADMIN SPEC - PW	15	32,245	40,307	48,368	32,760	0	1,097
	5012 CREW LEADER - STREETS	11	25,959	32,449	38,938	30,513	0	0
	5012 CREW LEADER - STREETS	11	25,959	32,449	38,938	37,835	0	0
	5012 CREW LEADER - STREETS	11	25,959	32,449	38,938	39,894	0	0
	5013 MAINT WORKER / CDL-	11	25,959	32,449	38,938	36,275	0	0
	5013 MAINT WORKER / CDL-	11	25,959	32,449	38,938	35,942	0	0
	5013 MAINT WORKER / CDL-	11	25,959	32,449	38,938	39,395	0	0
	5013 MAINT WORKER / CDL-	11	12,979	16,224	19,469	17,825 *	0	0
	5014 MAINT WORKER - WATER	10	24,387	30,484	36,581	34,486	0	0
	5014 MAINT WORKER - WATER	10	24,387	30,484	36,581	30,950	0	0
	5014 MAINT WORKER - WATER	10	24,387	30,484	36,581	32,323	0	0
	5015 MAINT WORKER - STREETS	9	22,816	28,520	34,224	28,080	0	0
	5015 MAINT WORKER - STREETS	9	22,816	28,520	34,224	29,640	0	0
	5015 MAINT WORKER - STREETS	9	22,816	28,520	34,224	32,323	0	0
	5015 MAINT WORKER - STREETS	9	22,816	28,520	34,224	32,323	0	0
	5015 MAINT WORKER - STREETS	9	22,816	28,520	34,224	36,275	0	0

DEPARTMENTAL SUMMARY

COST SUMMARY

TO MINIMUM TO MAXIMUM

Number Of Positions Evaluated : 25
Current Annual Payroll : 986,856
Proposed Annual Payroll To Minimum : 992,899
Percentage Change Over Current Payroll : 0.61
Proposed Annual Payroll To Midpoint : 1,002,196
Percentage Change Over Current Payroll : 1.55

New Pay Schedule Adjustments : 6,043 15,340

TOTAL COST 6,043 15,340

Fire Chief Hiring Process – Timeline

Action	Milestones
1. Identify Hiring Need	Fire Chief retiring December 31, 2020
2. Review of Job Description	October 9, 2020
3. Devise a Recruitment Plan - Strategy on how to publicize the position, both internally and externally, criteria for initial candidate screening, what the interview process will look like and who will conduct the interviews	Personnel Committee Meeting, October 8, 2020
4. Development of Hiring Brochure	October 16 – 23, 2020
5. Advertise the Position Internally & Externally- City website, social media, local newspaper, fire industry publications, job posting websites, etc.	October 23 – November 16, 2020
6. Review Applications	November 20, 2020
7. Standardized Assessment	November 20 – 27, 2020
8. Phone Interviews & Initial Screening	November 30 – December 7, 2020
9. Conduct Interviews, Meet & Greet	December 14 – 18, 2020
10. Perform Background, Reference Checks & Physical Exam	December 28 – 31, 2020
11. Final Decision & Presentation of Offer Letter	January 2021

City of Isle of Palms**Boards and Commissions - 2020 Appointments****Planning Commission**

Vacancies: 3

Jeffrey Rubin	New Applicant
Chris Marquez	New Applicant
Ray Burns*	New Applicant
David Cohen	New Applicant
Steven Corney	New Applicant
Alexander Stone	New Applicant

Accommodations Tax Advisory

Vacancies: 3

Susan Haynie	Current Member	*Did not submit new application. Unreachable
Margaret Miller	Current Member	
Julise Spell	Current Member	
Ray Burns*	New Applicant	*Applied for both ATAX and PC. He wants to interview for both.
Ted McKnight	New Applicant	
Douglas Truslow	New Applicant	

Board of Zoning Appeals

Vacancy: 1

Pete Doherty	Current Member	*Did not submit new application. Unreachable
Brian Abel	New Applicant	
Jean Murray	New Applicant	

Planning Commission Applicants

Application for Boards and Commissions

Applicant Name

Jeffrey Rubin, MD FACS

Position Sought

Planning Commission

Home Phone

(843) 242-8032

Work Phone**Mobile Phone**

(864) 237-3941

Email

reedrub@icloud.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

3

Address

25 Waterway Island Drive, Isle of Palms, South Carolina 29451

Occupation and Title

Vascular Surgeon-recently retired

Business or Employer Name**Have you ever served on a board or commission for the City of Isle of Palms or another local government?**

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Began inner city high school medical access program. Board member Mill Creek Park System

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

Since we first owned a home on the IOP, twenty years ago, we have cherished our Island community and I would like to do my best to help preserve the culture and uniqueness of our island. We all recognize changes which are occurring and I think there needs to be some forecasting and planning if we wish to maintain the Island's personality. I will send my CV by fax or drop it off if requested

Upload Résumé

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

Application for Boards and Commissions

Applicant Name

Chris Marquez

Position Sought

Planning Commission

Home Phone**Work Phone****Mobile Phone**

(843) 642-6655

Email

marquezeemail@gmail.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

9

Address

41 Morgans Cove Drive, Isle of Palms 29451

Occupation and Title

Real Estate

Business or Employer Name

Self

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

n/a

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

n/a

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

Interest in serving our community. Over the years I have been active in participation and support of Council Candidate elections and would like to be even more directly involved in the future of our City.

Upload Résumé

CHRIS MARQUEZ - Resume Summary.pdf

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Chris Marquez

41 Morgans Cove Drive
Isle of Palms, SC 29451
(843) 642-6655 · marquezemail@gmail.com

OVERVIEW

27 years of Business Experience; 17 years Sole Proprietorship, including Independent Contractor, and Small Business Owner. 10 years in Corporate Management with government contracting firms.

SUMMARY

Strong analytical ability and meticulous nature provide successful management. Background includes roles such as team member, manager, and consultant, business owner, and entrepreneur. Organized and detail-oriented with proven ability to plan, perform produce.

EDUCATION & TRAINING

BA Finance - Marymount University, Arlington, VA.

Licensed Real Estate Agent - State of South Carolina, LIC#: 85031

Oracle Database Certification - Northern Virginia Community College, Loudoun, VA.

PROFESSIONAL EXPERIENCE

Real Estate Sales & Development

Current Development, LLC. Charleston, SC. 2013 - 20019

D&C Partners, LLC. Charleston, SC. 2013 - 20019

Sole Proprietor / Small Business Owner

GEARE, LLC. Charleston, SC 2009 - 20013

Director: Information Technology, Logistics, Human Resources, Administration

MVM, Inv. McLean VA. 2006 - 2008

Sr. Oracle DBA / Independent Consultant

Capitol Advantage Fairfax, VA. 2002 - 2006

Sr. Oracle DBA

SAIC Inc. Washington, DC. 1999 – 2002

Technical Recruiter / Independent Contractor

Washington, DC. 1996 – 1999

Assistant Manager, Logistics

MVM, Inv. McLean VA. 1991 - 1996

CLEARANCES

DOD "Secret" - 2004

INS Public Trust: 6C Level / T1 Access - 1999

DOS "Secret" - 1993

HOBBIES & INTERESTS

Traveling, Ice Hockey, Golf, Surfing.

Founder, "Tesla Owners Charleston SC"

Application for Boards and Commissions

Applicant Name

Ray Burns

Position Sought

Accommodations Tax Advisory Committee

Home Phone**Work Phone****Mobile Phone**

(843) 860-1161

Email

reb3542@yahoo.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

6

Address

6 Morgan's Cove Court, Isle of Palms, South Carolina 29451

Occupation and Title

Owner

Business or Employer Name

Sea Oats IOP LLC

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

My interest in serving on the Accommodations Tax Advisory Committee is to volunteer to promote tourism, arts and cultural affairs for Isle of Palms in a responsible well managed manner in the best interest of the City and the community. Being both a full time resident and owner of a short term rental property affords me an objective view of potential ATAC projects.

Upload Résumé

Summary resume2.docx

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Raymond E. Burns

Resume

6 Morgan's Cove Court
Isle of Palms, SC 29451

Cell: 843-860-1161
Email: reb3542@yahoo.com

Employment Experience

Plastic Molding Advisors, LLC

2015 to present

Owner and President of consulting business serving the plastics manufacturing industry

Sea Oats IOP, LLC

2009 to present

Owner and manager of beach rental property

Mack Molding Company

President of the Southern Division

1997 to 2014

President of two plant (SC/NC) southern division of Mack Molding Company, a plastic injection molding business. Managed all manufacturing operations, sales, engineering, finance, human resources, IT, procurement, quality, safety and environmental. Responsibilities included P&L performance, meeting corporate objectives for growth, quality, compliance and customer satisfaction, capital expenditures, budgeting and forecasting. The division comprised of 500 employees with annual revenues in excess of \$100 million/year.

Vice President General Manager Southern Division

1991 to 1997

Responsibilities identical to role of President of the Southern Division

Vice President Sales

1981 to 1991

Responsibility for sales management and development of six plant (VT, SC, NC) plastic injection molding manufacturing business. Orchestrated major acquisitions of two competitors to create southern division. Over ten-year period grew business by 600% to being a leader in the industry.

Nypro, Inc

Senior Sales Representative

1974 to 1981

Account responsibility for major accounts and all corresponding commercial activity

Community Activity

Member of Isle of Palms Short-Term Rental and Phased Reopening Task Force	2020
Sea Oats HOA Board Member-Isle of Palms	2017-present
Birds of Prey- capture and transport volunteer	2016-present
Spartanburg Chamber of Commerce Economic Development Committee	1995-2005
Chaugnessey HOA-Board member & Board President-Greenville, SC	2003-2007

Education

Babson College Wellesley, MA	BSBA Finance Major	1974
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Application for Boards and Commissions

Applicant Name

David Cohen

Position Sought

Planning Commission

Home Phone

(843) 886-8692

Work Phone

(843) 886-8692

Mobile Phone

(843) 718-9228

Email

ddcohen92@bellsouth.net

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

33

Address

3504 Cameron Blvd., Isle of Palms, South Carolina 29451

Occupation and Title

Electronics Engineer

Business or Employer Name

retired

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

Yes

If yes, please provide information about that service

Planning Commission July 2009 - Dec 2012, chairman 2012

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Member IOP Methodist church, volunteer youth leader

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

As a part time resident since 1981, permanent resident since 1987 home owner since 1990 and volunteer relief worker after hurricane Hugo, I feel I have a lot of experience that would benefit the planning commission and city council.

Upload Résumé

David Cohen Resume-2019.pdf

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

David Cohen

3504 Cameron Blvd.
Isle of Palms, SC 29451
(843)-886-8692
ddcohen92@yahoo.com

Retired Electronics Engineer with 35 years experience supporting design, installation and maintenance of Naval communication equipment.

PROFESSIONAL EXPERIENCE

NAVAL INFORMATION WARFARE CENTER (NIWC) ATLANTIC, Charleston, SC

Lead Systems Engineer, September 2010 – May 2019

- Evaluate the planning, design and certification of electronic systems supporting Naval Intelligence, Surveillance and Reconnaissance (ISR) and Data Analytics operations.
- Provide training in systems engineering best practices, US Navy policy and command processes and procedures to engineering project teams.
- Prepare and brief Analysis of Alternatives to address high risk issues and concerns that could not be resolved within the project team.
- Developed command policies for implementing engineering practices.
- Created developmental plans and evaluated engineering personnel.

UNITED STATES NAVY, Charleston, SC

Civilian Electronics Engineer, November 1983 – September 2010

- Performed installation, testing, calibration and repair of SONAR and Radio equipment on surface and sub-surface naval vessels.
- Created installation plans for shipboard electronic systems to include power, structural, cabling and HVAC design.
- Performed hardware and software design of electronic modules in support of Intel and Communication systems.
- Developed and maintained budgets and schedules for the design, production, testing, installation and maintenance of naval Intel and Communication systems.

EDUCATION

Tennessee Technological University, Cookeville, TN

Bachelor of Science in Electrical Engineering, May 1986

HOBBIES AND INTEREST

- Adult leader guiding young adults and youth in restoration of dilapidated homes through Salkehatchie Summer Service.
- Youth leader volunteer Isle of Palms Methodist Church
- Woodworking, sailing, snow skiing, hunting and SCUBA diving

Application for Boards and Commissions

Applicant Name

Steven Corney

Position Sought

Planning Commission

Home Phone

(843) 697-9998

Work Phone**Mobile Phone****Email**

steve@corney.org

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

20

Address

13 Edgewater Aly, Isle of Palms, South Carolina 29451

Occupation and Title**Business or Employer Name****Have you ever served on a board or commission for the City of Isle of Palms or another local government?**

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

State your interest in serving on this Board or Commission.

I love living on IOP and would like the opportunity to utilize my experience to support the City. I recently retired from a 40-year career as a professional engineer planning, managing and implementing civil and environmental projects for federal, municipal and corporate clients.

Upload Résumé

Corney Resume 090418.pdf

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

STEVEN J. CORNEY, P.E.

13 Edgewater Alley • Isle of Palms • South Carolina • 29451 • 843-697-9998 • steve@corney.org

Technical leader and senior operations executive with extensive experience in civil and environmental engineering projects and the management of engineering, consulting and construction business operations. Experienced as a member of a corporate executive management team and with the strategic, financial, management and operations requirements of worldwide operations. Demonstrated strategic planning and business development experience that has resulted in the growth of business units, technical practices, national programs and client account relationships. Manages relationships with industrial, commercial, federal and municipal clients. Strengths also include:

- Alternative Delivery Project Implementation
- Project Earned Value Management
- Contract Negotiation
- Technical Leadership
- Interpersonal Communication
- Operations Performance Management
- Strategic Planning / Revenue Growth
- Client Relationship Management
- Team Building
- Licensed General Contractor

EXPERIENCE

AECOM Technology Corporation, Charleston, South Carolina (1999 to 2017)

Vice President/ Practice Leader /Alternative Delivery Programs (2008 to 2017)

Responsible for capture and implementation of performance based remediation, design/build, and EPCM civil, environmental and cross-discipline projects, programs and clients. Portfolio of projects includes manufacturing, oil & gas, chemical, pharmaceutical, utility and public sector clients, including landfill design and construction, sediment dredging, water treatment, facility deactivation and soil and groundwater assessment, remediation and closure. Development and implementation of complex projects as Lead Engineer or General Contractor and contract mechanisms including design/build, performance-based, cost-to-closure, EPCM and alternative contracting mechanisms utilizing environmental, water, transportation and facilities business lines.

Vice President/ Southeast Regional Manager/ Earth Tech, Inc. (1999 to 2008)

Regional Executive with P&L responsibility for 680 employees in 14 offices in South Carolina, North Carolina, Georgia, Alabama and Florida including consulting and construction practices for environmental, transportation, water/wastewater treatment and facilities engineering. Clients included industrial companies, state/local municipalities and federal agencies. Responsible for growth initiatives, including: expansion of key industrial accounts; development of national watershed management and planning initiative; and capture of new contracts for DOE.

TEAM, A Limited Liability Company, Mt. Pleasant, South Carolina (1997 – 1999) **President / Founder**

Founder and director of an engineering and construction firm specializing in project management, technical direction and innovative technology implementation for the electric power generating industry. Projects included the laser alignment of turbine components for generators at fossil and nuclear power generating plants and the evaluation and repair of high-pressure steam turbines and generators.

McLaren/Hart, Incorporated, Detroit, Michigan (1988 – 1997)**Vice President / National Director of Engineering & Director of Central Region Operations**

Member of the company's Executive Committee with management and technical responsibility for the Engineering Practice in 17 offices nationwide. Also responsible for P&L and strategic direction for the Central Region. Grew the region from one office to eight offices in Michigan, Ohio, Pennsylvania, Illinois, Texas and Missouri. Responsible for projects including, negotiations with U.S. EPA and state agencies for PRP Superfund sites; design and manufacture of thermal desorption treatment systems; deactivation, remediation and demolition of automotive manufacturing facilities and implementation of brownfield redevelopment alternatives; TRI reporting and development of manufacturing product life cycle program; and design and construction of water treatment systems, containment caps, and slurry walls for soil and groundwater remediation projects.

Chrysler/AMC/Jeep Corporation, Highland Park, Michigan (1985 – 1988)**Manager / Plant Engineering, Energy & Environment**

Manager of Environmental Activities for Jeep Corporation including all air, water and hazardous substance compliance programs, conversion of coal-fired boilers, construction of wastewater treatment plant and air permitting of all operations. After Jeep Corporation was acquired by Chrysler Corporation, managed the Chrysler Remediation Program and the corporate financial reserve accounts at all facilities for RCRA, CERCLA and TSCA liabilities.

Ford Motor Company (1979 to 1985)**Senior Facilities Engineer, Livonia, Michigan**

Provided facility and environmental engineering support for manufacturing plants in Michigan, Ohio, Indiana and Puerto Rico including, the development of facility asset preservation and preventative maintenance programs for water and wastewater treatment systems, HVAC, boilerhouses, roads, roofs, fire protection systems, and electrical distribution systems. Implemented wastewater treatment design and construction program at 13 facilities for pretreatment program compliance.

Environmental Engineer, Dearborn, Michigan

Supervised the construction, startup and operation of four wastewater treatment plants for the Rouge Manufacturing Plants--the world's largest industrial complex. Responsible for monitoring and reporting program for wastewater discharges totaling 1 billion gallons per day.

Jahnke & Jahnke Associates, Waukesha, Wisconsin (1976 to 1979)**Civil Engineer / Surveyor**

Engineer and surveyor for civil infrastructure project design and implementation for municipal and residential clients.

EDUCATION/REGISTRATIONS

The Pennsylvania State University (B.S. Civil Engineering)

Registered Professional Engineer (MI 6201034871)

Licensed General Contractor (SC 100281)

Application for Boards and Commissions

Applicant Name

Alexander Stone

Position Sought

Planning Commission

Home Phone

(843) 224-7279

Work Phone**Mobile Phone****Email**

sandy@islandrealty.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

46

Address

7 Ensign CT, 7 Ensign court, 7 Ensign court, Isle of Palms 29451

Occupation and Title**Business or Employer Name****Have you ever served on a board or commission for the City of Isle of Palms or another local government?**

Yes

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

State your interest in serving on this Board or Commission.

I am interested in serving on the Planning Commission and want to serve our community. As a long term occupant and Business leader I have a lot of continuity from years past as well a very diverse background from my many travels to other communities and being involved on the fringes in Columbia with our State Government with the Association of Realtors.

Upload Résumé

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Accommodations Tax Advisory Board Applicants

Application for Boards and Commissions

Applicant Name

Margaret V Miller

Position Sought

Accommodations Tax Advisory Committee

Home Phone

(843) 367-1868

Work Phone

(843) 569-5636

Mobile Phone

(843) 367-1868

Email

mvmiller05@me.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

35

Address

2702 Hartnett Blvd, Isle of Palms, South Carolina 29451

Occupation and Title

Sr. Vice President Audit Services

Business or Employer Name

South Carolina Federal Credit Union

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

Yes

If yes, please provide information about that service

Currently sit on Accommodations Tax Committee

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Low Country Orphan Relief

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

Interested in ensuring funds received via accommodation taxes are applied to activities that positively promote Isle of Palms. During my commission to the A-Tax Committee, there were requests to funds activities that did not fully support or promote Isle of Palms in a positive manner. With the growth in neighboring communities, not all requests will have a positive impact on Isle of Palms. Sitting on the A-Tax Committee and questioning the requests has helped both promote and protect Isle of Palms.

IF it is determined that I would be an asset to another committee, I am not opposed to discussing moving to another committee. I am interested in serving the City of Isle of Palms in whatever capacity I am needed.

Thank you,
Margaret

Upload Résumé

Miller Resume March 2020.doc

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

Margaret Miller, Senior Vice President of Audit Services

2702 Hartnett Boulevard
Isle of Palms, South Carolina 29451
H: 843.367.1868 / W: 843.569.5636

Summary of Qualifications:

Education

- Bachelor of Arts in Early Childhood Psychology (minor in Child Psychology and German Language Arts) – Radford University, Radford Virginia – May 1977
- Master's Degree in Business Administration (MBA) – Augusta university, May 1984

Certifications

- Certified Financial Services Auditor (CFSA) - The Institute of Internal Auditors - 1999
- Credit Union Compliance Expert (CUCE) – Credit Union National Association – 2005
- Certified Business Manager (CBM) – Association of Professionals in Business Management - 2002
- Certification in Risk Management Assurance (CRMA) – The Institute of Internal Auditors - 2012

Affiliations

- Association of Credit Union Internal Auditors (ACUIA) 1998 – present
- Institute of Internal Auditors (IIA) 1998 – Present
- Association of Professionals in Business Management (APMB) 2002 – present
- Isle of Palms Commerce Association 1987 - present

Profile

- 21 years' cumulative internal audit experience to include internal control evaluation and effectiveness, risk identification, compliance assurance, and providing valuable recommendations for improvement to control environments
- 17 years' cumulative management experience to include audit, compliance and risk management functions
- Excellent communication and leadership skills
- Advanced decision-making capabilities and proven ability to independently make and act upon those decisions
- Outstanding interpersonal skills to work with all levels of the organization

Employment History:

South Carolina Federal Credit Union June 1998 - Present:

- Auditor, June 1998 – March 2003
- Audit Manager, March 2003 – February 2005
- Senior Vice President of Audit Services, February 2005 - Present

Carolina First Bank October 1996 – June 1998:

- Branch Manager / Loan Officer

Interstate Johnson Lane April 1994 – October 1006:

- Operations / Office Manager

First Union Bank N.A. July 1987 – April 1994

- Vice President / Loan Officer

Trust Company Bank N.A January 1981

- Branch Manager / Loan Officer

Application for Boards and Commissions

Applicant Name

Julise Spell

Position Sought**Home Phone**

(910) 612-3570

Work Phone

(843) 882-2026

Mobile Phone

(832) 224-8438

Email

ETCHEDIMAGES@GMAIL.COM

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

15

Address

PO BOX 697, ISLE OF PALMS, South Carolina 29451

Occupation and Title

Director of Property Management

Business or Employer Name

Wild Dunes Resort

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

Yes

If yes, please provide information about that service

ATAX Committee

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

State your interest in serving on this Board or Commission.

I would like to continue to serve on the ATAX Committee

Upload Résumé

Julise WD Resume 2020.pdf

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

WILD DUNES DIRECTOR OF PROPERTY MANAGEMENT

JULISE J. SPELL

PO Box 697 - Isle of Palms, SC 29451
Personal Cell (910) 612-3570

CAREER Director of Property Management at Wild Dunes Resort with a business background

EDUCATION UNIVERSITY OF NORTH CAROLINA @ WILMINGTON

Dean's List

Bachelor of Arts Degree in Elementary Education

METHODIST UNIVERSITY

Graduated Suma cum Laude 4.2 (GPA)

President's List

Member – Chapter of Alpha Chi Honor Society

Member – Delta Mu Delta Honor Society

Bachelor of Science Degree in Business Administration

Concentration: (RM) Resort Management

(PTM) Professional Tennis Management – accredited by
USPTA and endorsed by the PTR

QUALIFICATIONS

Solid Communications and Leadership Skills

Etched Images by JS Designs – Former Co-owner of family owned business

Real Estate – Former Graduate of Realtor Institute (GRI)

Former Certified Residential Specialist (CRS)

Related Education: GRI Courses 100, 200, 300

CRS Courses 201, 202

Bachelor's Degree in Elementary Education (K-12)

Tennis – Assistant

USTA Tennis Certification: Beginning adult program

Junior Tennis clinic, ages 6-14

Wild Dunes Resort Internship:

Front Desk Agent

PBX Operator

Tennis Pro Shop

Activities Desk

Reservations

Data Processing (Springer Miller System)

Property Management Owner Relations Administrator

Housekeeping Inspector

Coordinator for Guest Distribution & Housekeeping, etc.

Human Resource Administrator

Wild Dunes Resort:

Property Manager - SC Licensed

Senior Property Manager

Safety Committee Member

Star Committee Member

SC Property Manager in Charge

Director of Property Management

Village POA Manager

Wild Dunes Resort, managed by Hyatt

Total quality customer and client service

Result-focused individual

Qualifications in research and valuation

- **Sales Experience** (in highly competitive environments)

Insurance Sales Agent

President's Club for Top Agents

Top Producer of Group Health Insurance in SE region

Real Estate Broker in NC– Licensed agent

Million Dollar Club

Multi-Million Dollar Club

Related Education: Win-Win Negotiations

Fair Housing Training Program

Fast Start Training Program

Listing and Selling for Higher Production

Superstars of North America

Mandatory & Update Courses – License Renewal

Etched Images – Co-Owner & Sales - Etched art in glass & mirror

Experience in networking contacts

- **Management Experience**

Real Estate – Management of residential listings and sales

Related Education: Best Seller Listing Presentation

Discover the Difference

Problem solving and decision-making

Administration skills

Quality control

Strategic planning and implementation

Wild Dunes Resort – Owner Relations Administrator

Wild Dunes Resort - Property Manager

Wild Dunes Resort - Senior Property Manager

Duties: Owner Statements, Management of Housekeepers and Inspectors, Maintenance Inspections and Reporting, Prepare for Owner Arrivals, Maintaining units for Guest Satisfaction, Staff Scheduling & 1:1 Staff Meetings, etc.

Wild Dunes Resort – Director of Property Management (2010-present)

Properties – oversight of an average of 250 individually owned rental vacation homes and condos

Oversight of 106 (153 keys) Village condo rentals

Staff – oversight of average of 4 Property Managers plus 8 support staff, plus temp staff

Duties: Financials and Owner Statements, Item Replacement, Home Inspections, Property Ratings to maintain quality requirements, Monthly Owner Newsletter, Liaison with local HOAs, work with Outside Building and Repair Contractors, Pest Vendors, Decorators, etc. to assist Owners with projects or home renovations, review REVINATE Guest Scores and put in place solutions to improve quality of rental units, bringing on new rental listings, etc., management and follow up on Annual Property Management Owner Surveys, etc.,

Wild Dunes Resort – Manager of Property Management Maintenance Department

Properties – average 250 individually owned vacation homes and condos

Staff – average 8 staff members (admin, supervisor, maintenance techs), plus temp staff

Duties: Ensure all work orders are followed up on in a prompt manner, maintenance Inspections, oversight of Minor Maintenance program and rental maintenance projects, etc.

Village at Wild Dunes - Property Owners Association Manager (2010 to present)

Designations: CMCA, AMS (requiring a number of educational courses)

Properties: 115 units/164 keys (both rentals & full-time residents) in 3 building in complex

POA Manager for both Master and Residential POA Boards

Duties – Preparing documents for all board meetings, Reserve Studies, arranging for building maintenance and inspections on behalf of the Boards, Lenders Questionnaires, etc.

Few examples: Replaced hallway carpets, retile foyers, replacement of plaza furniture, painting, housekeeping in common areas, etc.

- **Marketing Experience**

Insurance – Marketing of insurance policies (Life, health & group to businesses)

Real Estate – Preparing market analysis

Related Education: The Power of Personal Marketing

Listing Strategies for a Changing Market

Effective multi-task management skills

Marketing plan development

- **Organization Skills**

Real Estate – Regular customer follow-up

Qualification of Buyers and Sellers
Preparing and presenting all offers promptly
Coordinating smooth closings

PROFESSIONAL WILD DUNES RESORT, Isle of Palms, SC
ISLE OF PALMS TAX ACCOMODATION COMMITTEE MEMBER
PINEHURST RESORT, Village of Pinehurst, NC
NATIONAL COUNTRY CLUB, Pinehurst, NC
ETCHED IMAGES BY JS DESIGNS, Wilmington, NC
PRUDENTIAL CAROLINA REAL ESTATE, Wilmington, NC
HOWARD PERRY & WALSTON REALTORS, Wilmington, NC
COLDWELL BANKER HANOVER REALTY, Wilmington, NC
LIFE OF GEORGIA INSURANCE COMPANY, Wilmington, NC
BILLY HENDERSON REALTY, Wilmington, NC
NEW HANOVER COUNTY SCHOOLS, Wilmington, NC
GRIFTON W. JONES BUILDER, INC., Wilmington, NC

ADDITIONAL INFORMATION

PROFESSIONAL SKILL SETS:

Specialized in residential sales, market analysis, market plan development
Offering Solid Communications, negotiating and leadership skills
Strategic planning and implementation
Dynamic and results-focused individual with outstanding qualifications in research and valuation
Organized and maintains a huge database of owner information

RESPONSIBILITIES:

Management of residential listings, sales and property management
Regular follow-up
Qualifications of owner of rental units
Prepare and present rental agreements promptly
Coordinating smooth listing process
Coordinating Housekeeping and Maintenance for each rental unit
Financial: oversee monthly owner statements

AREAS OF STRENGTH:

Presentation and closing skills
Communication skills both verbal and written
Effective multi-task management skills
Problem solving and decision-making skills
Networking contacts
Organization and administration skills
Total quality customer/client service
Passionate and enthusiastic towards my responsibilities, the owners and the company
Self-motivated
Belief in teamwork and positive attitude towards all (fellow associates, owners, etc.)
Good listener
Able to adjust the approach depending on the needs and outlook of owners

COMPUTER SKILLS Windows, MS Works, Microsoft (Outlook, Word, Excel, Power Point, One Note), Quick Books, Micrografx Draw, Springer-Miller System, Servidyne Itendant, HotSOS, DASH, Birchstreet, KABA, REVINATE, etc.

INTEREST Photography, Travel, Animals, Reading, Golf

-References & supporting documentation furnished upon request-

OTHER EXPERIENCE

- **Hospitality Food and Beverage**

Pinehurst Resort, NC: Large Events ranging from 400-850 people

Wine Festival

Club Corp Event

Mercedes Benz Event

Duke's Children Hospital Event

Unilever Business Party

Pinehurst Resort, NC – Set-up, Break-down, Hostess and Service:

Seminars for Nationwide Wine Connoisseurs

Gourmet Dessert Buffet Event

Wine Exhibition, Arts Council and Culinary Stations

Low Country Banquet

Formal Dining Awards Banquet

Carolina Dining Room @ Pinehurst Resort, NC

Hostess, Buffet, Station (serving), Fine Dining & set-up

Members Gala @ National Country Club in Pinehurst, NC

Assisted Executive Chef and served

- **Bookkeeping and Accounting Experience**

Grifton W. Jones Construction Company, Inc. – Assistant bookkeeper

Etched Images by JS Designs – Bookkeeping

Life of Georgia Insurance Company – Premium payments collections

Wild Dunes Resort – Corporate data entry

- **Graphics and Artistic Experience**

Etching of mirrors and glass – custom artwork

Art designs, layouts and graphics

TENNIS PROFILE

Former USTPA Certified Teaching Professional

Methodist College Women's Tennis Team

Regional Doubles Finalist: Ruth Hopkins Memorial Tennis Tournament

Sportsmanship Award: Ruth Hopkins Memorial Tennis Tournament

Member of USPTA

Former participant of:

USTA Women's 4.0 League Team

USTA combo League Team

USTA Mixed League Team

Greater Wilmington Tennis Association Member (GWTA)

Application for Boards and Commissions

Applicant Name

Ray Burns

Position Sought

Accommodations Tax Advisory Committee

Home Phone**Work Phone****Mobile Phone**

(843) 860-1161

Email

reb3542@yahoo.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

6

Address

6 Morgan's Cove Court, Isle of Palms, South Carolina 29451

Occupation and Title

Owner

Business or Employer Name

Sea Oats IOP LLC

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

My interest in serving on the Accommodations Tax Advisory Committee is to volunteer to promote tourism, arts and cultural affairs for Isle of Palms in a responsible well managed manner in the best interest of the City and the community. Being both a full time resident and owner of a short term rental property affords me an objective view of potential ATAC projects.

Upload Résumé

Summary resume2.docx

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Raymond E. Burns

Resume

6 Morgan's Cove Court
Isle of Palms, SC 29451

Cell: 843-860-1161
Email: reb3542@yahoo.com

Employment Experience

Plastic Molding Advisors, LLC

2015 to present

Owner and President of consulting business serving the plastics manufacturing industry

Sea Oats IOP, LLC

2009 to present

Owner and manager of beach rental property

Mack Molding Company

President of the Southern Division

1997 to 2014

President of two plant (SC/NC) southern division of Mack Molding Company, a plastic injection molding business. Managed all manufacturing operations, sales, engineering, finance, human resources, IT, procurement, quality, safety and environmental. Responsibilities included P&L performance, meeting corporate objectives for growth, quality, compliance and customer satisfaction, capital expenditures, budgeting and forecasting. The division comprised of 500 employees with annual revenues in excess of \$100 million/year.

Vice President General Manager Southern Division

1991 to 1997

Responsibilities identical to role of President of the Southern Division

Vice President Sales

1981 to 1991

Responsibility for sales management and development of six plant (VT, SC, NC) plastic injection molding manufacturing business. Orchestrated major acquisitions of two competitors to create southern division. Over ten-year period grew business by 600% to being a leader in the industry.

Nypro, Inc

Senior Sales Representative

1974 to 1981

Account responsibility for major accounts and all corresponding commercial activity

Community Activity

Member of Isle of Palms Short-Term Rental and Phased Reopening Task Force	2020
Sea Oats HOA Board Member-Isle of Palms	2017-present
Birds of Prey- capture and transport volunteer	2016-present
Spartanburg Chamber of Commerce Economic Development Committee	1995-2005
Chaugnessey HOA-Board member & Board President-Greenville, SC	2003-2007

Education

Babson College Wellesley, MA	BSBA Finance Major	1974
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Application for Boards and Commissions

Applicant Name

Douglas Truslow

Position Sought

Accommodations Tax Advisory Committee

Home Phone**Work Phone****Mobile Phone**

(803) 606-8655

Email

doug_truslow@yahoo.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

2

Address

23 21st ave, Isle of Palms, South Carolina 29451

Occupation and Title

Attorney/Partner

Business or Employer Name

Truslow and Truslow Attorneys

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

See attached

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

See attached.

Upload Résumé

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Application for Boards and Commissions

Applicant Name

Ted McKnight

Position Sought**Home Phone**

(570) 660-5320

Work Phone**Mobile Phone****Email**

tedmcknight8@gmail.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

18

Address

2 Shad Row, Isle of Palms, South Carolina 29451

Occupation and Title

Retired: previously District Attorney 24 years

Business or Employer Name

Clinton County Pennsylvania

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

Yes

Please list community and volunteer activities you may be involved in.

In addition to being the DA for 24 years, served in positions of leadership on numerous boards

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

I have a wealth of experience in the area of public safety including having written numerous pieces of criminal justice legislation and sentencing. Was previously president of the Pennsylvania District Attorneys Association and Vice Chair of the Pennsylvania Commission on Sentencing. Served on the Executive Committee of both organizations for 11 years.

Upload Résumé

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

Application for Boards and Commissions

Applicant Name

Rod Turnage

Position Sought

Any

Home Phone

(843) 297-0134

Work Phone

(843) 297-0134

Mobile Phone

(843) 297-0134

Email

rodturnage@gmail.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

6

Address

139 Sparrow Dr, Isle of Palms, South Carolina 29451

Occupation and Title

Senior Director of Sales and eCommerce

Business or Employer Name

Eastern Power Technologies, Inc.

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

IOP Beach Clean Up; Trail Life USA; Charleston 180 Place Volunteer; IOP Rec Dept Basketball Coach; Dream Center

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

NO

State your interest in serving on this Board or Commission.

My initial interview with the City was a few years back. Since that time, I have maintained my interest in serving the Board or Commission. I believe that my work experience has prepared me serve the citizens of Isle of Palms. For the past twenty-plus years, my career has involved working directly with federal and state agencies. This experience allows me to see matters from the standpoint of the government entity, and the tax paying citizen. My deep love for the island, it's residents and natural resources drive my passion to serve.

I promise to be a responsible, reliable and trustworthy member of the IOP Board or Commission.

Thank you for your sincere consideration.

Rod Turnage

843-297-0134

Upload Résumé

RETRES020720.pdf

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

RODERICK E. TURNAGE (ROD)

139 Sparrow Drive
Isle of Palms, SC 29451
Telephone (843)297-0134
E-Mail: rodturnage@gmail.com

EXECUTIVE LEADERSHIP – SALES/BUSINESS DEVELOPMENT

SUMMARY OF QUALIFICATIONS:

- Background encompasses extensive professional experience in sales and business development in the following key areas of responsibility: territory development and management; strategic and systemic thinking; maintaining/upgrading existing clients; cross functional resource management and communication; need assessments; sales presentations; contract negotiation; contract launch and implementation; sales management process; change management, political acumen, developing others.
- Highly skilled in: establishing key partnerships and generating initial revenue; developing business models and leveraging channel opportunities; large contract/project negotiations, organization change management, vertical market start up, strategic partner relations, procurement and supply chain management, cross functional collaboration, measuring success.
- Strengths: excellent communication/people skills (able to develop a positive relationship with individuals of all ages and backgrounds); self-motivated; proven time management skills; well organized; highly responsible; extensive background negotiating complex contracts.

EDUCATION/TRAINING:

Bachelor of Science (1994) College of Charleston – Charleston, South Carolina
Major: Corporate Communications, Business Administration

Training: Dale Carnegie Course; Dale Carnegie Sales Training, Dimensions of Professional Selling, The Leader's Institute Fearless Presentations, Government Contract Compliance, Situational Leadership I & II, and Profitable Growth Strategies.

PROFESSIONAL EXPERIENCE:

Senior Director of Sales and eCommerce

Feb 2018 to Current

Eastern Power Technologies, Inc. – Greenville, SC

Responsible for leading a team of employees in sales, strategy, distribution, contracts, marketing and customer support. EPTI is a women-owned small business affiliate of Eastern Power Technologies, Inc. (Voted by Integrated Marketing as a "Best Places to Work in South Carolina 2017" Greenville/Columbia/Charleston Business Magazine).

Accomplishments:

- Hired initial staff and implemented internal processes
- Contributed to division being profitable in year one of new vertical market focus.
- Negotiated and secured initial contracts valued at over \$10M.

Senior Channel Business Manager – Strategic Resellers

March 2015 Feb 2018

W.W. Grainger, Lake Forest, IL

Management and Business Development of Strategic Reseller group aligned to the Brand and Marketing team. Customer base includes 15 major suppliers including Big Box, Integrators, eTailers, and Co-Ops.

Duties include contract negotiation, business development, program development and management, strategic development, eCommerce strategy, and customer relations. This customer group includes, Lowe's, Tractor Supply, Orgill, Do it Best, True Value, and Vallen among others.

Accomplishments:

- Exceeded Sales Goal for 2016, Growth of 35% through August 2017
- Turned Customer Base into profitable growth for the first time in 10 years
- Negotiated and closed eight new contracts in 2016 valued at \$34M annually
- 2017 Sales trending to \$44M, \$12M growth over 2016.

Senior Channel Business Manager – Southeast Small Business

March 2014 to March 2015

W.W. Grainger, Lake Forest, IL

Management and Business Development of Small Business Partners. Includes women-owned, minority-owned, service-disabled, and set aside contracts. Served as a cross-functional leader between Grainger direct sales team and small business sales team and leadership. Collaboration supported state and federal contracts with small business requirements.

Senior Government Sales Manager

July 2012 to March 2014

W.W. Grainger, Charleston, South Carolina

Responsible for contract negotiations and the national sales strategy servicing Defense Logistics Agency (DLA), and General Services Administration (GSA). 2014 sales growth in excess of \$9M and 125% to goal. Played a key role in closing GSA contracts and internal projects: Federal Strategic Sourcing Initiative negotiation and implementation valued at \$250M; World Class Government Contractor team member.

Accomplishments:

- Annual Achievers 2014
- GSA FSSI Awards for MRO and JanSan

Senior Government Sales Manager

July 2011 to July 2012

W.W. Grainger, Charleston, South Carolina

Responsible for national coverage of US Army and Defense Logistics Agency to increase market presence. Lead change management to increase customer relevance, developed and implemented a successful national go to market strategy. Responsible for internal, customer, and key supplier negotiations. Worked cross functionally with Brand, Product Management, Life Cycle Management and lead Company Value Proposition discussions with District leaders and Account Managers. Developed and implemented a small business strategy to address the 80% small business spend of the US Army. This included eBusiness channels and partner development.

Government District Sales Manager – Carolinas

January 2009 to July 2011

W.W. Grainger, Charleston, South Carolina

Responsible for exceeding sales goals, implementing sales strategies, Account Manager coaching, management of twelve direct reports, contract negotiation and compliance for North Carolina and South Carolina. This includes customer segments from government healthcare, military, federal civilian, federal contractors, prime vendors, CENTCOM, state, local, primary education and higher education government accounts.

Accomplishments:

- Leader Manager of the Year 2010

- Annual Achievers Club 2009
- Responsible for \$42M in sales in 2009
- Responsible for \$23M in sales in 2010

Government Sales Manager – NC, SC, GA

September 2005 to December 2008

W.W. Grainger, Charleston, South Carolina

Responsible for exceeding sales goals, implementing sales strategies, Account Manager coaching, customer relationship management, contract negotiation and compliance for North Carolina, South Carolina, and Georgia State, local, and higher education government accounts.

Accomplishments:

- Grew sales from \$16.5 million in 2005 to \$23.5 Million in 2008
- 3rd Quarter Apex Award in 2008
- Negotiated and signed statewide MRO contract with State of North Carolina in 2007
- 3rd Quarter Navigator Award in 2007
- 2007 Star Award
- Customer First Award – Quarter 4 2005
- Annual Achievers Club 2007

Government Account Manager

January 2004 to August 2005

W.W. Grainger, Charleston, South Carolina

Responsible for exceeding sales goals, customer relationship management, and contract compliance for 30 federal, military, healthcare, state, local, and higher education government accounts.

Accomplishments:

- Exceeded sales goal – 135% goal performance and increased sales 33% to prior year, 2005
- Exceeded sales goal - 108% goal performance and increased sales 35% to prior year, 2004
- Top Producer Award, Quarter 1, 2004
- Top Producer Award, Quarter 3, 2004

Territory Manager

August 2001 to December 2003

W.W. Grainger, Charleston, South Carolina

Responsible for sales, customer relationships, and growing sales for 350 plus accounts in Lowcountry South Carolina. Customers include U.S. Federal Government, United States Air Force, United States Navy, State of South Carolina, and Fortune 500 Manufacturers.

Accomplishments:

- Annual Achiever's Club 2003
- Annual Achiever's Club 2002
- Increased sales by 34% in 2002, 15% in 2003

Director of Business Development

June 2000 to June 2001

Impressa, Inc., Atlanta, Georgia

Responsible for establishing key partnerships, hiring resources, and generating initial revenue for start-up. Managed sales team with yearly sales of \$7 million plus.

Accomplishments:

- Developed business models, and go-to-market strategies to leverage channel opportunities with solution providers, internet service providers, application service providers, and independent software vendors.
- Worked closely with Product Development, Marketing, training and Product Support to position Impressa in the small to medium business marketplace.
- Closed strategic partnership agreements, and consistently achieved sales goals.

Account Manager**December 1997 to June 2000****Eastern Industrial Supplies, Inc.** Greenville, South Carolina

Responsible for managing customer relationships and growing sales revenue for 116 plus accounts in Upstate South Carolina.

Accomplishments:

- Developed relationships with major companies such as B.F. Goodrich, Fuji Photo Film, General Electric and Kemet Electronics, and leading mechanical contractors.
- Achieved sales revenue of \$2.3 million per year.
- Produced gross profit revenues 10% above industry average.
- Surpassed annual quota for sales and gross profit yearly.

Account Manager**September 1994 to December 1997****Ferguson Enterprises,** Greenville, South Carolina

Responsible for growing and maintaining Industrial Division to service Upstate South Carolina.

- Increased sales by over 40% as outside sales representative.
- One year as lead for industrial inside sales group.
- Selected as initial team member for Ferguson Corporate Industrial Sales Training

ACCOMPLISHMENTS:

- Exceeded sales goal 12 of last 15 years.
- Annual Achiever's Club for Top Sales Performers - 2002, 2003, 2007, 2009
- Led # 1 Sales district company-wide 2006, 2007, 2008
- Grainger Manager of the Year 2010
- 2000 World Champion Blind Golf Coach, Scotland

INTERESTS:

- Community Service – Seacoast Church, Dream Center for Community Development, Charleston 180 Place Food Bank Volunteer monthly, Isle of Palms Recreation Department Volunteer Coach 2015 – 2018, Trail Life USA Youth Program – Parent Leader 2018 – 2020.
- Family, running, beach clean-up, fishing, golf, guitar, reading, and writing

REFERENCES:

Available upon request.

Board of Zoning Appeals Applicants

Application for Boards and Commissions

Applicant Name

Brian Abel

Position Sought

Building Code Board of Appeals

Home Phone

(240) 381-3398

Work Phone

(240) 381-3398

Mobile Phone

(240) 381-3398

Email

BrianAbel87@gmail.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

1

Address

9510 Palmetto Drive, #4301, Isle of Palms 29451

Occupation and Title

Structural Engineer (Buildings) / President (retired)

Business or Employer Name

ABEL Consulting Engineers

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

No

If yes, please provide information about that service

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Board of Directors at Ocean Club

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.

No

State your interest in serving on this Board or Commission.

I have extensive experience with the IBC code and ASCE 7 as it relates to building structures. I have interacted with contractors, architects, and other engineers all over the United States. I believe my work history and experience would be an asset to the Code Board of Appeals.

Upload Résumé

BRA resume[4422].docx

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.

Resume

Brian R. Abel, P.E.

9510 Palmetto Drive #4301
Isle of Palms, SC 29451

Professional Experience:

ABEL Consulting Engineers, PA, Rockville and Frederick, MD - January 1986 – 01/01/2020 – Retired
President / Principal in Charge / Founder / Project Structural Engineer – Responsible for firm management, marketing, project management, project design, computer network administration and personnel

Design experience with steel, concrete, and wood structures. Design experience with the following building types: Multi-story office buildings, warehouses, data centers, educational facilities (K-12 and university), commercial residential facilities (hotels, apartments, elderly health care), retail structures, parking structures, pre-engineered structures, renovation and rehabilitation of existing structures, evaluation of existing structures,

Meyer Associates, PA, Rockville, MD - March 1977 – December 1985
Vice President / Project Structural Engineer – Responsible for project management, project design, computer network administration and personnel

Dewberry, Nealon & Davis, Fairfax, VA - May 1975 – March 1977
Structural Engineer – Responsible for structural design of projects under the direct supervision of a project manager

Education:

Pennsylvania State University / Bachelor of Science in Civil Engineering - 1975

Active Professional Registrations:

Georgia, Maryland, South Carolina,

Retired Professional Registrations (2019):

Alabama, Colorado, Delaware, District of Columbia, Florida, Illinois, Kansas, Louisiana, Massachusetts, Missouri, Mississippi, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Tennessee, Texas, Virginia, West Virginia

Professional Memberships:

American Society of Civil Engineers, American Institute of Steel Construction, American Concrete Institute, SEA-MW, NCEES

Continuing Education/Ongoing Professional Development:

“Concrete Slabs on Ground”, by American Concrete Institute, May 18, 2006
“Fundamentals of Earthquakes Eng.”, by American Society of Civil Engineers, September 28-29, 2006
“High Wind Workshops for Architects & Engineers”, by Simpson Strong Tie, November 7, 2007
“Design of Masonry Shear Walls”, by American Society of Civil Engineers, November 20, 2007
“Design of Steel Lintels in Masonry Walls”, by American Society of Civil Engineers, January 8, 2008
“Design of Cold Formed Steel Structures”, by American Society of Civil Engineers, September 18-19, 2008
“Revit Structure 2009 Essentials”, by Case Technologies, February 6, 2009
“Exploring Building Design with Steel Joist, Joist Girders, and Steel Deck”, by Steel Joist Institute, June 15, 2010
“Sustainable and Structural Restoration”, by IMI Masonry, September 11, 2011
“Progressive Collapse Mitigation”, by ASCE, January 26-27, 2012
“Design of Diaphragms, Chords & Collector in Steel Framed Building for Seismic Loads”, by AISC, June 13, 2013
“Fundamentals of Stability of Steel Design”, by AISC, June 3 – July 29, 2013
“Fundamentals of Earthquake Engineering for Building Structures”, by AISC, April 28, 2014
“Classical Methods of Structural Analysis”, by AISC, August 28, 2014
“Ethics for US Engineers”, by Suncam, November 23, 2015
“Improving the Safety of Schools and other buildings in earthquakes”, by PDHengineering, April 14, 2016
“Design, Construction & Renovation of Masonry Structures”, by ASCE, April 14, 2017
“Construction Administration for Engineers”, by ASCE, December 15-16, 2017

Application for Boards and Commissions

Applicant Name

Jean Murray

Position Sought

Board of Zoning Appeals

Home Phone**Work Phone****Mobile Phone**

(843) 412-6781

Email

Murrayjb29451@yahoo.com

Are you a resident of the Isle of Palms?

Yes

How many years have you lived in the Isle of Palms?

44

Address

233 Forest Trl, Isle of Palms, South Carolina 29451-2527

Occupation and Title

Retired

Business or Employer Name

N/a

Have you ever served on a board or commission for the City of Isle of Palms or another local government?

Yes

If yes, please provide information about that service

Served on IoP Playground Commission, Poll Manager for District 2

Have you served as an elected official of local government?

No

Please list community and volunteer activities you may be involved in.

Member of VFW Post 3137 Auxiliary, Co-President of the IoP Garden Club, member of Stella Maris Women's Club

Are you currently in a position of responsibility in an organization or board that has received or is seeking funding from the City of Isle of Palms? If yes, list position and date of hire.**State your interest in serving on this Board or Commission.**

As a long time resident of the IoP, there are so many aspects to love about the island-from the wonderful beaches to the community feel and I would not want to live anywhere else. In caring for the island, I feel the building that is taking place needs to be monitored for keeping within the limits of current building codes and to hear and decide any appeal and enforce zoning ordinances.

No resume uploaded-retired In 2012-worked for two airlines and as a travel agent for the government. My important job was staying at home with our children and volunteering at SI and Laing schools, President of SI PTA, coaching soccer, leading a Brownie troop and being involved in other activities as our children grew. Now it's time again to give to my community.

Upload Résumé

Note: This is an application only and indicates your willingness to serve on an Isle of Palms Board or

Commission. You will be notified when a seat is vacant and will be considered among other applicants. Final selection will be determined by the Isle of Palms City Council. Thank you for your interest in serving the Isle of Palms.