

INTRODUCED BY: COUNCIL MEMBER (s) Kaster

1 **AN ORDINANCE AWARDING BIDS FOR CERTAIN PRODUCTS AND**
2 **SERVICES TO THE LOWEST AND BEST BIDDERS AS REFLECTED IN THE**
3 **RESPONSES TO CERTAIN INVITATIONS FOR BID AND REQUESTS FOR**
4 **PROPOSALS FOR CLASSIFICATION AND COMPENSATION STUDY; AND**
5 **AUTHORIZATION FOR THE COUNTY EXECUTIVE TO EXECUTE ANY**
6 **NECESSARY AGREEMENTS OR CONTRACTS TO EFFECTUATE THE**
7 **AWARD OF THE BIDS AND PROPOSALS.**

8 **WHEREAS**, Jefferson County, Missouri, (hereafter, the "County") in response to
9 certain Invitations for Bid and Requests for Proposals issued by the County received bids
10 and proposals for the following items or services:

11 BID NAME

12 Classification and Compensation Study

13 NUMBER OF BIDS RECEIVED

14 7

15 DATE OF BID OPENING

16 10-12-2016

17 **WHEREAS**, after reviewing the bids and proposals set forth above, the
18 Department of Department of Administrative Services has determined that certain bids and

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WES WAGNER
COUNTY CLERK OF JEFFERSON COUNTY, MO.

1 proposals represent the lowest and best bid for the respective items or services and met the
2 bid or proposal specifications issued by the County; and

3 **WHEREAS**, the Jefferson County, Missouri, Council finds it is in the best interest
4 of the County to award the bids and proposals to Evergreen Solutions, LLC for a term from
5 11-14-16 to 11-13-17 upon approval by the County Council and County Executive for the
6 total amount up to **\$28,000.00** subject to budgetary limitations.

7 **BE IT ENACTED BY THE JEFFERSON COUNTY, MISSOURI, COUNCIL,**

8 **AS FOLLOWS:**

9 Section 1. The County awards the following bids and proposals which are
10 incorporated by this reference as if fully set out herein, to the lowest and best vendor
11 bidding for each respective item or service as follows:

12 BID NAME

13 Classification and Compensation Study

14 TERM

15 11-14-16 to 11-13-17

16 Upon approval by the County Council and County Executive

17 AMOUNT

18 Up to **\$28,000.00**

19 subject to budgetary limitations

20 AWARDED BIDDER

21 Evergreen Solutions, LLC

1 Section 2. The Jefferson County, Missouri, Council hereby authorizes the
2 County Executive to execute the agreement incorporated by Reference as Exhibit "A" and
3 any agreements or contracts necessary to effectuate the award of the bids and proposals set
4 forth in this Ordinance. The County Executive is further authorized to take any and all
5 actions necessary to carry out the intent of this Ordinance. An unexecuted copy of the
6 Agreement is attached hereto as Exhibit "A" and incorporated herein, by reference.

7 Section 3. Copies of all Invitations for Bid, Requests for Proposals, responses
8 thereto, and any contracts or agreements shall be maintained by the Department of the
9 County Clerk consistent with the rules and procedures for the maintenance and retention
10 of records as promulgated by the Secretary of State.

11 Section 4. This Ordinance shall be in full force and effect from and after its
12 date of approval. If any part of this Ordinance is invalid for any reason, such invalidity
13 shall not affect the remainder of this Ordinance.

THIS BILL BEING DULY INTRODUCED, THE MEMBERS OF THE JEFFERSON COUNTY, MISSOURI, COUNCIL VOTED AS FOLLOWS:

Council Member District 1, Don Bickowski	<u>Yes</u>
Council Member District 2, Renee Reuter	<u>Yes</u>
Council Member District 3, Robert Boyer	<u>Yes</u>
Council Member District 4, George Engelbach	<u>Absent</u>
Council Member District 5, Oscar J. "Jim" Kasten	<u>Yes</u>
Council Member District 6, Cliff Lane	<u>Yes</u>
Council Member District 7, James Terry	<u>Yes</u>

THE ABOVE BILL ON THIS 14th DAY OF November, 2016:

✓ PASSED FAILED



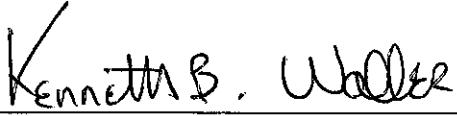
Renee Reuter, County Council Chair



Pat Schlette
Pat Schlette, Council Administrative Assistant

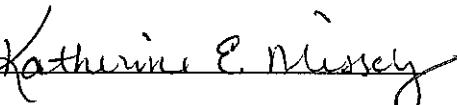
THIS BILL WAS APPROVED BY THE JEFFERSON COUNTY EXECUTIVE AND ENACTED AS AN ORDINANCE OF JEFFERSON COUNTY, MISSOURI, THIS 16th DAY OF November 2016.

THIS BILL WAS VETOED AND RETURNED TO THE JEFFERSON COUNTY, MISSOURI, COUNCIL WITH WRITTEN OBJECTIONS BY THE JEFFERSON COUNTY EXECUTIVE, THIS DAY OF , 2016.


Kenneth B. Waller
Kenneth B. Waller, Jefferson County, Missouri, Executive

ATTEST:


Wes Wagner
Wes Wagner, County Clerk

BY: 

Reading Date: 11-14-2016



**JEFFERSON COUNTY
DEPARTMENT OF ADMINISTRATIVE SERVICES**
729 MAPLE ST / PO BOX 100
HILLSBORO MO 63050
WWW.JEFFCOMO.ORG



**Request for Proposal: CLASSIFICATION AND
COMPENSATION STUDY**

Date Issued: 9-21-16

PROPOSALS SHALL BE ACCEPTED UNTIL: WEDNESDAY, OCTOBER 12, 2016, AT 2:00 P.M. LOCAL TIME.

**Specification
Contact:**

DAVID COURTWAY
Department of Administrative Services
636-797-6487
dcourtway@jeffcomo.org

**Contract
Contact:**

VICKIE PRATT
Department of Administrative Services
636-797-5380

**Mail (3) Three
Complete Copies
With Vendor And
Proposal
Information As
Shown In Sample:**

**Contract Term:
upon approval by
the County Council
and County
Executive**

**Vendor
Information:**

SAMPLE ENVELOPE

VENDOR NAME

VENDOR ADDRESS

CONTACT NUMBER

DEPARTMENT OF THE COUNTY CLERK

JEFFERSON COUNTY MISSOURI

729 MAPLE ST / PO BOX 100

HILLSBORO MO 63050-0100

SEALED PROPOSAL: (PROPOSAL NAME)

The undersigned certifies that he/she has the authority to bind this company in an agreement/contract to supply the commodity or service in accordance with all terms, conditions, and pricing specified. This Proposal, if accepted, will constitute an Agreement and Contract with Jefferson County, Missouri, upon approval of the County Council and County Executive. Prices are firm during this agreement term, unless agreed upon in writing by the County. The County has the option to renew this agreement at the same terms and conditions as the original agreement for one additional one-year term with the written consent of the successful bidder. Price increases for renewals are not authorized unless approved in writing by the County.

Evergreen Solutions, LLC Dr. Jeff Dung
Company Name Authorized Agent (Print)
2878 Remington Green Cir.
Address Signature
Tallahassee, FL 32308 Executive President
City/State/Zip Code Title
(850)383-0111 10/7/16 20-1833438
Telephone # Date Tax ID #
jeff@consultevergreen.com (850)383-1511
E-mail Fax #

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REQUIRED DOCUMENTS

- 1. Current and valid Certificate of Insurance or binder showing required insurance coverage must be provided with each bid.**
(County must be added as additional insured if awarded)
- 2a. Proof that Bidder does not owe delinquent real or personal property in Jefferson County (tax receipts for past 3 years)**
Obtain receipts at <http://jeffersonmo.devnetwedge.com>
- Or**
- 2b. A notarized affidavit stating that the applicant does not own any real or personal property in Jefferson County on company letterhead.**
- 3. A Notarized affidavit of work authorization and current business entity status with E-verification documentation (pages 9 & 10).**
- 4. Agreement to be executed by the County upon approval by the County Council and County Executive (Bidder is required to complete company information and execute signature).**
- 5. Cooperative Bid Form (last page)**
- 6. All pages of the Invitation for Bid/Request for Proposal must be used when submitting your bid/proposal response along with initialing each page with the bid/proposal. Additional information may be included separately.**
- 7. Bid deposits/bonds must be in the exact amount as stipulated in the bid. (if required)**

***BIDS WILL BE REJECTED IF REQUIRED DOCUMENTATION IS NOT INCLUDED OR COMPLETED**

PROPOSAL REQUIREMENTS

Bidder shall initial all pages and return where the Bid Document denotes

“BIDDER”S INITIALS: _____”

A.

PROPOSAL SUBMISSION:

Submit bid form in original (one original) and two (two copies) with all specification pages, if applicable. No facsimile or electronic proposals shall be accepted and shall be rejected. A fully executed Affidavit is required by Section 285.530 RSMo and shall be submitted with the proposal form. A copy of the Affidavit is attached hereto. Failure to execute the Affidavit shall result in the proposal being rejected. Vendor shall comply with the requirements of Sections 285.525 to 285.555 of the Revised Statutes of the State of Missouri. If any part of the work is subcontracted, each subcontractor shall comply with the same requirements of this specification. No contractor shall knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the State of Missouri. Vendor and any of its subcontractors, shall, by sworn affidavit and provision of documentation, affirm their enrollment and participation in a federal work authorization program with respect to the employees working in connection with the contracted services. Vendor and its subcontractors shall also sign an affidavit affirming that they do not knowingly employ any person who is an unauthorized alien.

Prevailing Wage Vendor and its subcontractors shall pay not less than the prevailing hourly rates of wages, as determined by the Labor and Industrial Relations Commission of Missouri. Vendor shall abide by the most current Annual Wage Order published by the Missouri Department of Labor and Industrial Relations or other similar resources and publications. Failure to comply with any provision, provide any required documentation, insurance forms or deposits or bonds in exact amounts or any other term or condition that is not in strict conformance shall result in the bid being rejected.

B.

BASIS OF PROPOSAL AWARD:

Award may be made on an item-by-item basis to the lowest and best proposals or award may be made to the lowest and best proposal total, whichever is in the best interest of the County. County may reject any or all proposals for any reason and may waive any informality. Proposals submitted from a Missouri State Contract shall include a copy of the State Contract with the proposal.

It is further agreed that the Contract shall not be valid and binding upon the County until approved by the County Counselor, as to legal form and is subject to the Ordinances, Resolutions and Orders of Jefferson County, Missouri, and State and Federal Law. If no proposal or proposals have been awarded by the County Council within forty-five (45) days following the opening of the proposal then all proposals will be deemed rejected.

C.

PROPOSAL PREPARATION:

1. Vendors are responsible for examination of drawings, specifications, schedules and instructions.
2. Each Vendor shall furnish the information required by the invitation. The vendor shall sign all required documents. All deletions and erasures shall be initialed.
3. Alternate proposals for supplies or services other than specified shall not be considered unless authorized by invitation.
4. Vendor shall state a definite time for delivery of goods or for performance of services unless otherwise specified in the Request for Proposal.
5. When specified, samples must be timely submitted and at no expense to the County.
6. Failure to adhere to all requirements may result in the response being disqualified as non-responsive.

D.

MODIFICATION OR WITHDRAWAL OF PROPOSALS:

Proposals may be modified or withdrawn prior to the exact hour and date specified for receipt of proposals, provided the modification or withdrawal is in writing and is delivered in the same manner as a proposal submission.

E.

LATE PROPOSALS:

It is the responsibility of the vendor to deliver his proposal or proposal modification on or before the date and time of the proposal closing to the Department of the County Clerk of Jefferson County. Proposals received late will be rejected and returned unopened to the vendor.

F.

PROPOSAL DEPOSITS/BONDS:

Proposal Deposits/Bonds are not required unless specified in the Specifications. Proposal deposits/Bonds must be in the exact amount as stipulated in the bid.

G.

MATERIAL AVAILABILITY:

Vendors must accept responsibility for verification of material availability, product schedules and other pertinent data prior to submission of proposal and delivery time. It is the responsibility of the vendor to notify the County immediately if the materials specified are discontinued, replaced, or not available for an extended period of time. All materials ordered by the County, shall be as needed. A sample of materials may be requested.

H.

ALTERNATE PROPOSALS:

Where required, vendors must submit complete specifications on all alternate proposals with the proposal form. Alternate proposals without complete specifications may be rejected. Alternate proposals and exceptions to proposal clauses must be clearly noted on the proposal form. The County may accept or reject alternate proposals; whatever is most advantageous to the County.

I. INCORPORATION OF DOCUMENTS:

The terms of the proposal invitation, proposal specifications, proposal form are and shall be incorporated into the contract as if fully setout therein. The Proposal, if accepted and approved by the County Council and County Executive shall constitute the terms of a Contract or Agreement with Jefferson County, Missouri, subject to any further Amendments, Memoranda or other documents or specifications which must be set forth in writing and signed by all parties.

J. ADDENDA:

Addenda to proposal specifications are incorporated by reference as if fully setout herein. It is the responsibility of the vendor to insure and verify that they are in receipt of and completed all attached addenda's prior to submission of proposal forms. Verification is made by contacting the Department of Administrative Services or by reviewing the County Web Site. (www.jeffcomo.org).

K. INSURANCE:

The Vendor/Contractor shall purchase and maintain insurance with an insurance company licensed to do business in the State of Missouri or in the state where the vendor is incorporated or otherwise licensed to do business and which shall remain, at all times during the term of any contract with the County, in full force and effect. Preference will be given to a Vendor/Contractor who provides insurance with an insurance company licensed to do business in the State of Missouri, but in any event said Vendor/Contractor shall provide said insurance at it's own expense. Such insurance shall be provided as will protect the Vendor/Contractor from claims which may arise out of or result from the Vendor/Contractor's execution of the work, whether such execution be by himself, his employees, agents, or by anyone for whose acts any of them may be liable. If any such work covered by the Contract is to be performed on County owned or leased premises, the Vendor agrees to carry liability and workman's compensation insurance, satisfactory to the County, and to indemnify the County against all liability, loss, and damage arising out of any injuries to persons and property caused by the Vendor, his sub-contractors, employees or agents. The insurance coverage shall be such as to fully protect the County and the general public from any and all claims for injury and damage resulting by any actions on the part of the Vendor/Contractor or its' forces as enumerated above. All policies must name the County as an additional insured and provide for thirty (30) days written prior to any material changes or cancellation. Any disputes regarding a breach, insurance amounts, liability, coverage, lapse or otherwise shall be litigated in the Circuit Court of Jefferson County, Missouri and the same shall be incorporated into any Contract agreed to by the parties.

THE COUNTY REQUIRES A CURRENT AND VALID CERTIFICATE OF INSURANCE OR BINDER SHOWING REQUIRED INSURANCE COVERAGE MUST BE PROVIDED WITH EACH BID. JEFFERSON COUNTY MUST BE ADDED AS AN ADDITIONAL INSURED AFTER AWARD OF THE BID. ANY LAPSE IN INSURANCE COVERAGE OR CANCELLATION THEREOF BY THE CONTRACTOR OR SUB-CONTRACTORS DURING THE TERMS OF THE CONTRACT SHALL IMMEDIATELY BE DEEMED A MATERIAL BREACH UNDER THE TERMS OF ANY CONTRACT.

A. (X)Required () Not Required **Comprehensive General Liability Insurance**

The Vendor/Contractor shall maintain and keep in full force and effect during the terms of this Contract such comprehensive general liability insurance as shall protect them from claims which may arise from operations under this Contract, whether such operations be by themselves or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$1,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death.

B. (X)Required () Not Required **Professional Liability Insurance**

The Vendor/Contractor shall provide the County with proof of Professional Liability Insurance, which shall protect the County against any and all claims, which might arise as a result of the operation of the Vendor/Contractor in fulfilling the terms of this Contract during the life of the Contract. The minimum amounts of such insurance will be \$1,000,000.00. Should any work be subcontracted, these limits will also apply.

C. (X)Required () Not Required **Worker's Compensation Insurance:
per Missouri Revised Statutes Chapter 287**

The Vendor/Contractor or his sub-contractor or contractors, shall maintain and keep in force of this Contract such worker's compensation insurance limits as required by the statutes of the State of Missouri and Employer's Liability with limits no less than \$500,000.00.

L. PROPOSAL OPENINGS:

Proposals will be publicly opened and read aloud at the time indicated on page 1. The vendors and the public are invited but not required to attend the formal opening of the proposals. No decisions relating to the award of a contract or agreement will be made at the opening.

M. PROPOSAL TABULATIONS:

Proposal Tabulations will be available 5 to 7 business days following the proposal opening. Proposal submissions are open for public review at the time of the proposal opening. Proposal tabulations are posted on the County's web-site address, www.jeffcomo.org, under the services tab, Invitation for Bid/Request for Proposal link. **NO COPIES** of proposal tabulations are sent to vendors.

PROPOSAL FORM AND CONTRACT

A. PROPOSAL REPRESENTATIONS:

The vendor, by executing the proposal form certifies that:

1. The proposal complies with Request for Proposal, Form and Proposal Specifications.
2. The vendor is not debarred or suspended from participation in Federal Assistance programs.

B. TAXES:

No bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property taxes to Jefferson County. The prospective bidder may be required to provide proof in the form of an original paid tax receipt issued by the Jefferson County Collector or a verified affidavit stating that the applicant does not own any real or personal property in Jefferson County. Tax receipts for the past 3 years are required and may be obtained at <http://jeffersononmo.devnetwedge.com/> or a notarized affidavit stating that the applicant does not own any real or personal property in Jefferson County on company letterhead.

Section 135.040 of the Jefferson County Code of Ordinances (Ord. No. 10-0411) requires that no bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property, or that the bidder does not own any real or personal property in Jefferson County. All delinquent real or personal property taxes shall be paid, in-full, prior to the award of any bid, or proof shall be provided that the bidder does not own any real or personal property in Jefferson County prior to the award of any bid. Jefferson County considers that the failure to pay any and all real or personal property taxes due Jefferson County, Missouri, the failure to report all real or personal property owned, held or used in Jefferson County, the failure to provide proof thereof, and/or the failure to keep said tax bills current shall be deemed a material breach of the contract and will subject the contract to immediate cancellation. All taxes, due and owing, must be paid in full at the time the bid is awarded by Jefferson County and remain paid during the entire term of the contract unless the prospective bidder provides proof that the bidder does not own real or personal property in Jefferson County. This requirement shall not apply to the award of bids for projects which are funded in whole or in part by Federal funds.

C. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:

1. The prices in the proposal shall be independently determined, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to price with any Vendor or other person.
2. Unless otherwise required by law, the prices shall not have been knowingly disclosed by the Vendor prior to opening; or
3. No attempt has been made or will be made by the vendor to induce any other person or firm to submit or not to submit a proposal.

D. PRICE:

The price(s) specified in this proposal shall be firm and not subject to contingency or reservation. The vendor represents prices specified in the proposal do not exceed current selling price for the same or substantially similar good or service, and are the same as or lower than other prices charged to the vendor's most favored customer. In the event the stated prices are determined to be higher than the prices for which Supplier has sold the items, or services, to others, this contract price shall be reduced accordingly. **Proposal prices are ALL INCLUSIVE: (Shipping, Handling, Delivery, and Assembly to locations specified by the County). Prices shall be firm for ALL County departments and locations for term of the agreement.**

E. MISSOURI DOMESTIC PRODUCT PROCUREMENT ACT:

Vendor represents that the goods provided comply with Sections 34.350 to 34.359, RSMo, known as the Domestic Product Procurement Act. The act encourages the purchase of products manufactured or produced in the United States, State of Missouri, and Jefferson County, Missouri. Vendor shall include proof of compliance with the Act with the proposal.

F. NON-EXCLUSIVE AGREEMENT:

The contractor shall understand and agree that the contract shall not be construed as an exclusive agreement and further agrees that the County may secure identical and/or similar services or products from other sources at anytime in conjunction with or in replacement of the contractor's services.

G. DEFINITIONS:

1. The term "County" means the Jefferson County, Missouri and its designated representatives.
2. The term "Vendor" means Supplier, Contractor, and Seller and includes designated representatives.
3. The term "RFP" means Request for Proposal.
4. The term "Agreement/Contract" means Binding Agreement, Contract, Request for Purchase, Order.

H. INSPECTION, ACCEPTANCE AND APPROVALS:

Goods shall at all times and places, including the period of manufacture, are subject to inspection and test by County. County will accept or give notice of rejection of goods delivered within a reasonable time after receipt. Acceptance shall not waive any warranty. All goods supplied are subject to final inspection and acceptance by County notwithstanding payment, prior inspections or approvals. County may require prompt replacement or correction of rejected goods at Supplier's expense, including a reduction in price for rejected goods. Supplier shall not resubmit rejected goods to County without prior written approval and instructions

from County. In addition, Supplier shall identify resubmitted goods as previously rejected. Supplier shall provide and maintain a quality assurance and control system acceptable to County.

I. WARRANTY:

Unless otherwise agreed to in writing by the parties, Supplier warrants that items ordered to specifications will conform thereto and to any drawings, samples or other descriptions furnished or adopted by County, or, if not ordered to specifications will be fit and sufficient for the purpose intended, and that all items will be new, merchantable, of good material and workmanship, and free from defect. Such warranties, together with Supplier's service warranties and guarantees, if any, shall survive inspection, test, acceptance of, and payment for the items and shall run to County and its assigns. Except for latent defects, the County shall give notice of any nonconformity to the Supplier within one (1) year after acceptance. County may return for credit or require prompt correction or replacement of the defective or non-conforming goods or have the defective good corrected or replaced at Supplier's expense. Return to Supplier of any defective or non-conforming goods and delivery to County of any corrected or replaced goods shall be at Supplier's expense. Defective or non-conforming items shall not be corrected or replaced without written authorization by County. Goods required to be corrected or replaced shall be subject to the provisions of this clause and the clause hereof entitled "Inspection, Acceptance and Approvals" in the same manner and to the same extent as goods originally delivered under this contract.

J. PAYMENT:

County will pay Supplier for goods upon delivery to, submission of certified invoices and acceptance. The County will not be responsible for articles or services furnished without a purchase order. Price is tax-exempt.

K. CHANGE ORDER:

County may make changes within the general scope of this contract. If any such changes cause an increase or decrease in the cost of or the time required for the performance of any part of the work, whether changed or not changed by any such order, an equitable adjustment shall be made in the price or delivery schedule or both, and any change order shall be in writing. Any claim by a Supplier for adjustment under this clause shall be asserted within fifteen (15) days from the date of receipt of this written order directing the change, provided, however, County, if it decides that the facts justify such action, may receive and act upon such claim asserted at any time prior to final payment.

L. DELIVERIES:

Deliveries shall be made in strict accordance with any delivery schedule contained in the proposal specification or contract and in the exact quantity ordered. Failure to adhere to delivery schedule is reason for termination in accordance with the "termination" clause. Deliveries are to be made at locations specified by the County at time of Order.

M. RESPONSIBILITY FOR SUPPLIES:

Pursuant to Section 290.560 RSMo, Supplier/Contractor shall employ only Missouri laborers and laborers from nonrestrictive states except that other laborers may be used when Missouri laborers or laborers from nonrestrictive states are not available, or are incapable of performing the particular type of work involved, if so certified by the contractor and approved by the County. Except as otherwise provided, Supplier shall be responsible and bear all risks for loss and damage to goods until delivery at County's facilities, regardless of F.O.B. point, point of inspection or acceptance; and if the goods are rejected.

N. SUBCONTRACTS:

Supplier shall not enter into any subcontract(s) in excess of \$25,000 or 20% of this contract price; whichever is less, for any goods without County's prior written approval.

O. CHOICE OF LAW:

This proposal and contract shall be governed and interpreted according to the laws of the State of Missouri. Venue for any court action shall be in Jefferson County, Missouri.

P. TERMINATION:

1. General: Performance of work may be terminated by the County in whole, or from time to time in part, whenever County shall determine that such termination is in the best interests of County. Termination shall be affected by delivery to Supplier of a Notice of Termination specifying the extent to which performance of work is terminated and the date upon which such termination becomes effective. If such notice does not state termination is pursuant to subparagraph 2, 3, or 4 of this paragraph, County shall have the right to so indicate within thirty (30) days. If no notice is delivered within the thirty (30) day period, or such longer periods as is mutually agreed to by the parties, the original Notice of Termination shall be deemed to be issued pursuant to subparagraph 1 of this paragraph.
2. Bankruptcy or Insolvency: In the event bankruptcy proceedings are commenced by or against Supplier or under any provisions of the United States Bankruptcy Act or for the appointment of a receiver or trustee or a general assignment for the benefit of creditors of either party, County shall be entitled to terminate without further cost or liability.
3. Section 135.040 of the Jefferson County Code of Ordinances (Ord. No. 10-0411) requires that no bid or proposal shall be awarded by Jefferson County unless the prospective bidder provides proof that the bidder does not owe delinquent real or personal property, or that the bidder does not own any real or personal property in Jefferson County. All delinquent real or personal property taxes shall be paid, in-full, prior to the award of any bid, or

proof shall be provided that the bidder does not own any real or personal property in Jefferson County prior to the award of any bid. Jefferson County considers that the failure to pay any and all real or personal property taxes due Jefferson County, Missouri, the failure to report all real or personal property owned, held or used in Jefferson County, the failure to provide proof thereof, and/or the failure to keep said tax bills current shall be deemed a material breach of the contract and will subject the contract to immediate cancellation. All taxes, due and owing, must be paid in full at the time the bid is awarded by Jefferson County and remain paid during the entire term of the contract unless the prospective bidder provides proof that the bidder does not own real or personal property in Jefferson County. This requirement shall not apply to the award of bids for projects which are funded in whole or in part by Federal funds.

4. Default: County may terminate the whole Contract or any part in either of the following circumstances:

- If supplier fails to deliver the items required by the contract within the time specified; or
- If supplier fails to perform any of the other provisions of the contract, or so fails to make progress as to endanger performance of the contract in accordance with its terms, and in either of these two circumstances does not cure such failure within a period of ten (10) days after notice from County specifying such failure. In the event of termination under subparagraph 1, County shall have the right to procure, on such terms and in such manner as it may deem appropriate, items similar to those terminated, and to recover from Supplier the excess cost for such similar items provided, however, Supplier shall not be liable for such excess costs where the failure upon which the termination is based has arisen out of causes beyond the control of Supplier and without the fault or negligence of Supplier. Such causes shall be deemed to include fires, floods, earthquakes, strikes, and acts of the public enemy. The rights of County provided in subparagraph 1 shall be in addition to any other rights provided by law or the contract.
- In the event of the Supplier's non-compliance with the provisions as set forth. This Contract may be cancelled, terminated or suspended in whole or in part and the supplier may be declared ineligible for further County contracts. The rights and remedies of the County provided in this paragraph shall not be exclusive but are in addition to any remedies provided in this Contract or as provided for by law.

Q. NOTICE AND SERVICE THEREOF:

Any notice from the County shall be in writing and considered delivered and the service thereof completed when said notice is posted, by certified or regular mail, to the Supplier, at the address stated on the proposal form.

R. CONTRACT TERM:

Performance shall be governed solely by the terms and conditions as set forth in the Request for Proposal, Proposal Specifications, Proposal Form and the Contract notwithstanding any language contained on any invoice, shipping order, bill of lading or other document furnished the Seller at any time and the acceptance by the County for any goods furnished.

S. COMPLIANCE WITH APPLICABLE LAWS:

Supplier warrants it has complied with all applicable laws, rules and ordinances of the United States, Missouri or any other Governmental authority or agency in the manufacture or sale of the goods, including but not limited to all provisions of the Fair Labor Standards Act of 1938, as amended.

T. ACTS OF GOD:

No party shall be liable for delays, nor defaults due to Acts of God or the public enemy, riots, strikes, fires, explosions, accidents, governmental actions of any kind or any other causes of a similar character beyond its control and without its fault or negligence.

U. SELLER'S INVOICES:

Invoices shall contain the following information. Contract number (if any), Purchase Order Number, Item number, contract description of goods or services, sizes, quantities, unit prices and extended totals. Invoices for and inquiries regarding payment should be addressed to the County Accounts Payable Clerk.

V. APPROVAL:

It is agreed the acceptance of a proposal shall not be valid and binding upon the County until approved by the County Purchasing Agent, County Council and County Counselor.

W. INDIVIDUAL, PARTNERSHIPS, CORPORATIONS:

Indicate: Individual: Partnership: Corporation.

Incorporated in the State of Florida.

X. LITIGATION:

This agreement shall be interpreted under the laws of the State of Missouri. Any disagreements, questions, controversies, litigation or other causes of action whatsoever arising from or under the terms of this agreement shall be resolved in the trial courts of 23rd Judicial Circuit Court of the State of Missouri-Hillsboro, Missouri.

Y. LANGUAGE: Bids and all related documents will only be accepted in the English Language.

THE INVITATION FOR BID / REQUEST FOR PROPOSAL NOTICES ARE POSTED ON THE JEFFERSON COUNTY, MISSOURI WEBSITE AT WWW.JEFFCOMO.ORG LOCATED UNDER THE SERVICES TAB, INVITATION FOR BID / REQUEST FOR PROPOSAL LINK.

SPECIFICATION
CONTACT

DAVID COURTWAY - DIRECTOR OF ADMINISTRATIVE SERVICES
636 797 6487

NICOLE CRAWFORD - HUMAN RESOURCES MANAGER
636 797-5563



AFFIDAVIT OF WORK AUTHORIZATION

The grantee, sub grantee, contractor or subcontractor who meets the section 285.525, RSMo definition of a business entity must complete and return the following Affidavit of Work Authorization.

Comes now Dr. Jeff Ling (Name of Business Entity Authorized Representative) as
Ex Vice-President (Position/Title) first being duly sworn on my oath, affirm
Evergreen Solutions (Business Entity Name) is enrolled and will continue to participate in the
E-Verify federal work authorization program with respect to employees hired after enrollment in the program
who are proposed to work in connection with the services related to The Classification & Compensation Study
(Bid/Grant/Subgrant/Contract/Subcontract) for the duration of the grant, subgrant, contractor, or subcontractor,
if awarded in accordance with subsection 2 of section 285.530, RSMo. I also affirm that
Evergreen Solutions (Business Entity Name) does not and will not knowingly employ a person
who is an unauthorized alien in connection with the contracted services related to
The Classification & Compensation Study (Bid/Grant/Subgrant/Contract/Subcontract) for the duration of
the grant, subgrant, contract, or subcontract, if awarded.

In Affirmation thereof, the facts stated above are true and correct. (The undersigned understands that false statements made in this filing are subject to the penalties provided under section 575.040, RSMo.)

Authorized Representative's Signature

Printed Name

Title

Date

Subscribed and sworn to before me this

(DAY)

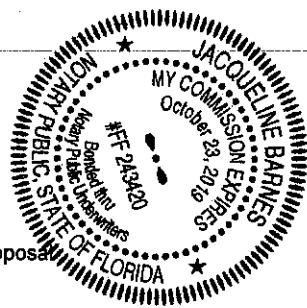
of October 2014 I am
(MONTH, YEAR)

commissioned as a notary public within the County of Leon, State of
(NAME OF COUNTY)

(NAME OF STATE)

Signature of Notary

Date _____



Request for Proposal

AFFIDAVIT OF WORK AUTHORIZATION
(Continued)

CURRENT BUSINESS ENTITY STATUS

I certify that Evergreen Solutions UC (Business Entity Name) MEETS the definition of a business entity as defined in section 285.525, RSMo pertaining to section 285.530, RSMo as stated above.

Dr. Jeff Ling

Authorized Business Entity
Representative's Name
(Please Print)

~~Authorized Business Entity~~
~~Representative's Signature~~

Evergreen Solutions, UC
Business Entity Name

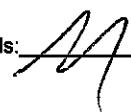
10/6/16
Date

As a business entity, the grantee, sub grantee, contractor, or subcontractor must perform/provide the following. The grantee, sub grantee, contractor, or subcontractor shall check each to verify completion/submission:

- Enroll and participate in the E-Verify federal work authorization program (Website: <http://www.dhs.gov/e-verify>; Phone: 888-464-4218; Email: e-verify@dhs.gov) with respect to the employees hired after enrollment in the program who are proposed to work in connection with the services required herein;

AND

- Provide documentation affirming said company's/individual's enrollment and participation in the E-Verify federal work authorization program. Documentation shall include a page from the E-Verify Memorandum of Understanding (MOU) listing the grantee's, subgrantee's, contractor's, or subcontractor's name and the MOU signature page completed and signed, at minimum, by the grantee, subgrantee, contractor, or subcontractor and the Department of Homeland Security – Verification Division; (if the signature page of the MOU lists the grantee's, subgrantee's, contractor's, or subcontractor's name, then no additional pages of the MOU must be submitted).



LEGAL NOTICE

REQUEST FOR PROPOSAL SEALED PROPOSAL

For

CLASSIFICATION AND COMPENSATION STUDY

For

JEFFERSON COUNTY, MISSOURI GOVERNMENT HILLSBORO, MO

Jefferson County is seeking proposals for Classification and Compensation Study. The county reserves the right to terminate the contract for any violation, by the successful vendor, of any term or condition of the contract by giving (30) days written notice stating the reasons therefore and giving the party time to remedy any deficiencies.

PROPOSAL INSTRUCTION

One (1) original and two (2) signed copies of the proposal must be received in a sealed envelope plainly marked **“Classification and Compensation Study”** with the date and time the proposal is due in the lower left corner of the envelope.

An authorized representative of the individual firm submitting the proposal must sign the proposal in blue ink.

Proposals must be submitted to:

Department of the County Clerk of Jefferson County, 729 Maple Street, Hillsboro, MO 63050 prior to October 12, 2016, 2:00 pm local time.

For this RFP, all proposals received by the County shall remain valid for ninety (90) days following the date of submittal. All proposals received in response to this RFP will become the property of the County.

Jefferson County reserves the right to accept and/ or reject any and all proposals.

PROPOSAL INQUIRIES

Inquiries regarding specifications contained in this request should be submitted in writing via E-mail (preferred) or mail to:

Nicole Crawford
Human Resources Manager
Department of Administrative Services
729 Maple St.
P.O. Box 100
Hillsboro, MO 63050
636-797-5563
ncrawford@jeffcomo.org

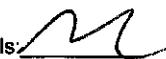
David Courtway
Director of Administration
729 Maple St.
P.O. Box 100
Hillsboro, MO 63050
636-797-6487
dcourtway@jeffcomo.org

All Questions must be received no later than 3:00 PM on 10/05/2016. Any question received after this deadline may not be answered.



TERMS AND CONDITIONS

- Jefferson County Reserves the right to reject any and all proposals or parts of a proposal and waive technicalities, and to adjust quantities.
- All proposals will be considered final. No additions, deletions, corrections or adjustments will be accepted after the time the proposals are due.
- Any delivery costs or charges must be included in the F.O.B destination proposal price.
- City, County and State of Missouri Sales Tax and Federal Taxes are not applicable to sales made to Jefferson County and must be excluded.
- The contract shall be effective for the approximate (12) month period from the date of the notice of award.
- The electronic version of this RFP is available upon request. The document was entered into WORD for Microsoft Windows. The County does not guarantee the completeness and accuracy of any information provided on the electronic version. Therefore, respondents are cautioned that the hard copy of the RFP on file in the Purchasing Office governs in the event of a discrepancy between the information contained in or on the electronic version and that which is on hard copy.
- Vendors are required to clearly identify any deviations from the specifications in this document.
- Vendors must submit three (3) signed copies of their proposals; one (1) is to be an original and so marked.
- All pages of the RFP must be initialed by an officer of the Company.
- An authorized officer of the company submitting the proposal must sign all proposals, in blue ink.
- All prices and notations must be in blue ink or typewritten on the attached form. Mistakes must be crossed out, corrections typed adjacent and must be initialed in blue ink by the person signing the proposal.
- Jefferson County will not award any proposal to an individual or business having any outstanding amounts due from a prior Contract or business relationship with the County or who owes any amount(s) for delinquent taxes, fees or licenses.
- Sealed proposals received after the designated time of the receipt of the sealed proposals will be considered as "Void" and will not be opened.
- The successful consultant is specifically denied the right of using in any form or medium the names of Jefferson County or any other public entity within the Jefferson County Government for public advertising unless express written permission is granted.
- All consulting firms must possess the necessary and appropriate business and/or professional licenses in their field.



- Award will be made to the low responsive, responsible consultant, or the consultant whose proposal is most advantageous to the County, price and other factors considered. When payments are to be made to the County, award will be made to the most advantageous offer.
- The County reserves the right to accept any item or group of items offered, unless the consultant qualifies his proposal by specific limitations. The proposal can be on an "all or none" basis if wording in the proposal so states and if all items solicited are included in the proposal.
- When applicable, the consultants shall provide unit prices and extension prices. Where there is disagreement in the unit and extension prices, the unit price shall govern.

DESCRIPTION OF WORK REQUIRED

Jefferson County Government is issuing a Request for Proposals (RFP) from qualified firms to assist the County in evaluation of its overall employee compensation, pay structure as compared to market, perform a job audit and analysis for each full-time position to determine appropriate classification; and update job descriptions. This study will not include benefits.

Background Information

Jefferson County is a First Class County with a Charter form of government located just South and South East of St. Louis County and St. Charles County. Both St. Charles and St. Louis County are first Class counties with a Charter form of government as well. Jefferson County Government currently employs approximately 680 Full Time and approximately 20 intermittent employees. The County's last comprehensive compensation plan review was conducted in 2010. At the conclusion of the study, the County implemented a merit system as part of the Personnel Administration plan along with pay grades establishing minimum and maximum salaries and job descriptions for most positions in the County. These steps were taken to fulfill requirements of the Home Rule Charter, which was adopted in November of 2008. There are approximately 300 Full time employees and 20 intermittent employees currently covered under 135 job titles classified into 19 compensation grades.

Jefferson County is seeking a base bid and a supplemental bid to the base bid for all full time positions except those positions of the Department of Juvenile Justice. The base bid shall include all positions except those in the Department of Juvenile Justice and the Department of Sheriff. The supplemental bid shall include full time positions in the Department of Sheriff.

Employees of the Department of Juvenile Justice are not part of the study.

Market salary is determined through the use of surveys from local municipalities and data derived from ERI salary database. Major "comparable agencies" used are First Class cities and counties, especially those Counties in Missouri with a Charter form of government which are St. Louis County, Jackson County and St. Charles County. Local municipalities including St. Louis City, St. Charles County and St. Louis County along with other "comparable city agencies" should be equally important when gathering market data.

The successful firm will be expected to work with Human Resources and Administration during all phases of this project, including onsite meetings and will be expected to present the final recommendations to the County Executive and County Council.

SCOPE OF SERVICES

All documents and deliverables shall be provided in Microsoft Word or Excel format on computer disk and in hard copy. All documents and deliverables become the property of the County and the author or the firm shall have no copyright interest. The County shall have the right to use all documents for any purpose. The County is requesting proposals for the following areas of work:

1. Job Audit and Analysis

- Evaluate current position classifications job descriptions and pay grades.
- Gather necessary employee information through the use of a combination of job analysis questionnaires and group and individual interviews.
- Information will be used to analyze the duties and responsibilities of each employee and position to determine the following:
 - Whether individual employees are appropriately classified

- Whether a position should be moved to a different job classification and/or pay grade.
- Whether position titles are appropriate.
- Other recommendations.

2. Job Descriptions

- All job descriptions shall be updated after review of job analysis questionnaires and interviews.
- Recommendations shall be made to revise, create or consolidate titles and classifications.
- Job descriptions should be established in a standardized format which is ADA and FLSA compliant. County will have review/input as to the final format of job descriptions.
- Revised job descriptions should include FLSA exemption tests to determining the appropriate FLSA overtime classification for each position based upon the duties and responsibilities provided in the job description.
- Final job descriptions to be provided to the County, with allowance for one set of revision included in project cost.

3. Final Report Requirements

- Methods used to conduct the salary survey results and methodology of job evaluation.
- Summarized position comparison data.
- Recommended classification plan.
- Recommendations for maintaining future market competitiveness.
- Other recommendations.

4. Other miscellaneous requirements

- Prepare an analysis of the financial impact for the implementation of recommended changes to the compensation plan.
- Provide a recommended job evaluation plan that would allow the County to evaluate positions every two (2) years.
- Provide administration manual with plan maintenance procedures.
- Provide sample documents to be used to communicate the compensation system change to current and future employees, and a summary document to communicate the full compensation system to current and future employees, both to be provided in reproducible hardcopy and electronic format.

The County is seeking a highly qualified individual and/or firm to provide a quality, thorough study. The selected individual and/or firm will be required to interface with employees and managers in an approachable manner. All products and recommendations must comply with applicable federal, state and local laws and enhance the County's ability to recruit and retain qualified personnel.

ESTIMATED SCHEDULE

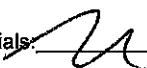
The estimated schedule is as follows:

County releases RFP	September 23, 2016
Responses due	October 12, 2016
Consultant Interviews (begin)	October 19, 2016
Contract awarded	November 9, 2016
Project start date, no later than	November 28, 2016
Draft Study due, no later than	January 15, 2017
Final Report due	March 1, 2017
Acceptance of Final Report	March 15, 2017

RFP REQUIREMENTS

Responses to this request should include the following information;

1. Consultant name and/or business name, DBA (if applicable) and principal contact person, including office location, address, telephone number, fax number and e-mail address.
2. A general description of the firm, including size, number of employees, primary business, and other business or services offered.
3. Identification of the project manager who will be the primary contact through all phases of the project, as well as the identification of the other personnel who will be performing engagement work and estimated expected contribution to the project in percentage of hours.
4. Qualifications information, which demonstrates the knowledge, experience, and capability that will enable the respondent to provide the services outlined in the description of work required, including a brief history of the firm and/or individual including the number of years in business, number of classification and compensations studies completed. This will shall also include summary information regarding the qualifications and professional experience of staff that will perform work under this engagement.
5. Description of the firm's understanding of the requested services including the proposed approach, specific project steps including detailed information regarding the number and length of onsite work, timeline to include specific estimated schedule items, and interim and final work products. Innovative approaches or concepts, especially those reducing project cost, are encouraged.
6. List of references of at least four (4) municipal/local government clients for which services have been provided which are similar to those in the Scope of Services of this document. References should include client name, address, telephone number and email address for the contact person of each organization. Also include the services provided and total fees paid by each reference agency for the project.
7. Fees should be submitted on the Proposal Submission Form, or similar form, provided in this document, divided by category of Service including optional services.



8. Proposals shall provide a statement as to whether any portion of work performed under this proposal will be subcontracted or performed under a partnership or joint venture. Information on such entities must be included in the proposal such as related experience and qualifications of assigned staff.
9. Submission shall include sample interim and final report formats.

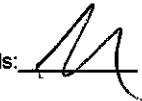
REVIEW AND SELECTION CRITERIA

All proposals submitted before deadline will be reviewed to determine compliance with the requirements of the RFP. Primary factors in the evaluation include, but will not necessarily be limited to:

1. Demonstrated understanding of the scope of work and the overall classification and compensation study as set forth in the RFP including Consultant's strategy for carrying out the needed work tasks to meet the goals.
2. Firm and staff's demonstrated qualifications and expertise regarding relevant experience with municipal clients.
3. The firm's present workload and demonstrated capacity to complete project in a professional manner and within approved timeline.
4. The firm's past record of performance, if any, with respect to quality of work and ability to deliver on goals, timelines and budget.
5. The quality, conciseness and completeness of the proposal.
6. Project timeline.
7. Proposed fees.

Proposals will be evaluated in accordance with the evaluation criteria. The County may hold interviews with firms determined to have a reasonable chance of being selected for award based upon the evaluation criteria specified. The interviews, if held, are projected to take place the week of October 19, 2016.

Proposals will be evaluated based on criteria outlined in the RFP, interviews, and reference checks. An agreement will be negotiated with the Consultant whose qualifications would be most advantageous to the county, all factors considered. If an agreement cannot be reached with the top ranked Consultant, the county will then negotiate with the second ranked consultant.



EXCEPTION SHEET

If the item(s) and/or service(s) proposed in the response to this proposal is in any way different from that contained in this proposal, the proposer is responsible to clearly identify all such differences in the space provided below. Otherwise, it will be assumed that the proposer's offer is in total compliance with all aspects of the proposal.

Below are the exceptions or differences to the stated specifications (attach additional sheets as needed):

N/A



PRICING PAGE
CLASSIFICATION and COMPENSATION STUDY
PROPOSAL DUE DATE: OCTOBER 12, 2016 2:00 PM

Funding limitations may require Jefferson County Government to perform part of the work outlined in the SCOPE OF SERVICES. An estimated break-down of the cost for each of the components of the scope is requested.

FEE PROPOSAL

Base Bid

TASKS

Compensation Study with financial impact

\$ 11,000⁰⁰

Job Audit and Analysis

\$ 12,500⁰⁰

Job Descriptions

\$ 4,500⁰⁰

TOTAL

\$ 28,000⁰⁰

Addition 1 to Base Bid

Department of Sheriff.

Compensation Study with financial impact

\$ 14,000⁰⁰

Job Audit and Analysis

\$ 15,500⁰⁰

Job Descriptions

\$ 6,500⁰⁰

TOTAL

\$ 36,000⁰⁰

AUTHORIZED SIGNATURE

Must be signed by a person having the authority to contractually bind the business.

Signature

Dr. Jeff Lung, Ex. Vice President
Print Name and Title

10/7/16
Date

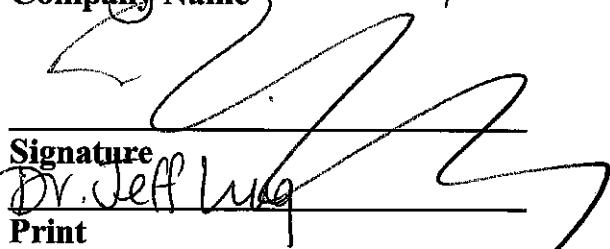
(850)383-0111
Phone Number

ML

In Witness thereof, the parties hereto have executed this Agreement, in triplicate, as
of this 7th day of October 2016:

Evergreen Solutions, LLC

Company Name



Signature

Dr. Jeff Lueb

Print

Company Address:

2818 Remington Green Cir.
Tallahassee, Florida 32308

Phone: (850) 383-0111

County of Jefferson, State of Missouri

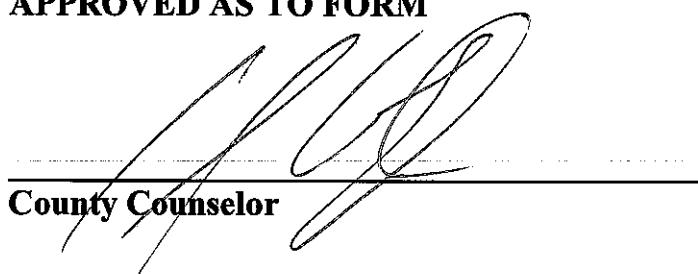
Kenneth B. Waller
Kenneth B. Waller County Executive

I hereby certify under section 50.660 RSMo there is either: (1) a balance of funds, otherwise unencumbered, to the credit of the appropriation to which the obligation contained herein is chargeable, and a cash balance otherwise unencumbered, in the treasury, to the credit of the funds from which payment is to be made, each sufficient to meet the obligation contained herein; or (2) bonds or taxes have been authorized by vote of the people and there is a sufficient unencumbered amount of the bonds yet to be sold or of the taxes levied and yet to be collected to meet the obligation in case there is not a sufficient unencumbered cash balance in the treasury.



County Auditor

APPROVED AS TO FORM



County Counselor

COOPERATIVE BID FORM

Bid Name: Classification & Compensation Study

INSTRUCTIONS: Bidders **MUST** fill out this form as part of the bidding process and attach to your bid response to Jefferson County, Missouri.

COOPERATIVE PROCUREMENT CONTRACT

This is a cooperating supply contract in accordance with Chapter 130, Section 130.020. K.3., of the Procurement Policy and Procedures, Jefferson County Code of Ordinances.

Will you extend bid prices, cash terms, and all other terms and conditions of any contract resulting from this bid with Jefferson County, Missouri, to any Jefferson County, Missouri, Municipality, government agency, district, sub-district or other tax-supported entity?

Yes No

Although agreeing to the extension of the terms of this contract to municipalities or other tax-supported entities, *is not a prerequisite for award*, Jefferson County, Missouri, may take this factor into consideration if tie bids are received, in addition to the normal Terms and Conditions of the Invitation for Bid, enclosed herewith as a part of this bid.

Bidders are encouraged to extend contract prices to Municipalities and any other tax-supported entities.

If agreeable to the above, state the **minimum** dollar value *per order* you will require from a Municipality or any other tax-supported entity (this shall not apply to Jefferson County, Missouri Government, Departments or Divisions):

MINIMUM DOLLAR VALUE PER ORDER: \$ 28,000⁰⁰

BY: Ex. Vice President

TITLE: Ex. Vice President

COMPANY: Evergreen Solutions

CONTACT INFORMATION FOR COOPERATIVE AGREEMENT

Phone (850) 383-0111 E-mail jeff@consultevergreen.com

THIS FORM WILL BECOME PART OF THE BID DOCUMENT PACKAGE SUBMITTED TO JEFFERSON COUNTY, MISSOURI



CERTIFICATE OF LIABILITY INSURANCE

EVERSOL-01 CBILLINGTON

DATE (MM/DD/YYYY)
9/27/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERs NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER

Rogers, Gunter, Vaughn Insurance, Inc.
1117 Thomasville Road
Tallahassee, FL 32303

CONTACT
NAME:

PHONE (A/C No. Ext): (850) 386-1111

FAX (A/C No): (850) 385-9827

E-MAIL

ADDRESS:

INSURER(S) AFFORDING COVERAGE NAIC #

INSURER A: MAPFRE Insurance 34932

INSURED

Evergreen Solutions LLC
2878 Remington Green Circle #101
Tallahassee, FL 32308

INSURER B: Foremost Insurance

11185

INSURER C: Hartford

22357

INSURER D:

INSURER E:

INSURER F:

COVERS

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE		ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY			CP0008008576000	08/17/2016	08/17/2017	EACH OCCURRENCE	\$ 1,000,000	
	<input type="checkbox"/> CLAIMS-MADE	<input checked="" type="checkbox"/> OCCUR					DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000	
							MED EXP (Any one person)	\$ 10,000	
							PERSONAL & ADV INJURY	\$	
							GENERAL AGGREGATE	\$ 2,000,000	
							PRODUCTS - COMP/OP AGG	\$ Included	
								\$	
	GEN'L AGGREGATE LIMIT APPLIES PER:								
	<input type="checkbox"/> POLICY	<input type="checkbox"/> PROJECT	<input type="checkbox"/> LOC						
	OTHER:								
A	AUTOMOBILE LIABILITY			CP0008008576000	08/17/2016	08/17/2017	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000	
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person)	\$	
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident)	\$	
	<input checked="" type="checkbox"/> HIRED AUTOS	<input type="checkbox"/> SCHEDULED AUTOS	<input checked="" type="checkbox"/> NON-OWNED AUTOS				PROPERTY DAMAGE (Per accident)	\$	
								\$	
A	<input checked="" type="checkbox"/> UMBRELLA LIAB	<input checked="" type="checkbox"/> OCCUR		TBD	08/17/2016	08/17/2017	EACH OCCURRENCE	\$ 1,000,000	
	<input type="checkbox"/> EXCESS LIAB						AGGREGATE	\$	
								\$	
	<input type="checkbox"/> DED	<input type="checkbox"/> RETENTION \$							
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY		<input type="checkbox"/> Y/N	WC002675207	10/24/2015	10/24/2016	<input checked="" type="checkbox"/> PER STATUTE	OTHE	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)		<input type="checkbox"/>				E.L. EACH ACCIDENT	\$	1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	\$	1,000,000
							E.L. DISEASE - POLICY LIMIT	\$	1,000,000
C	Professional Errors			21PG0258846	08/17/2016	08/17/2017	Each Claim		
									1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Professional Liability has a \$2,000,000 Aggregate limit

CERTIFICATE HOLDER

CANCELLATION

Jefferson County Missouri
729 Maple St/PO Box 100
Hillsboro, MO 63050

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

POLICY NUMBER:

COMMERCIAL GENERAL LIABILITY
CG 24 04 10 93

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name of Person or Organization:

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

The TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US Condition (Section IV – COMMERCIAL GENERAL LIABILITY CONDITIONS) is amended by the addition of the following:

We waive any right of recovery we may have against the person or organization shown in the Schedule above because of payments we make for injury or damage arising out of your ongoing operations or "your work" done under a contract with that person or organization and included in the "products-completed operations hazard". This waiver applies only to the person or organization shown in the Schedule above.



THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

**ADDITIONAL INSURED – OWNERS, LESSEES OR
CONTRACTORS – AUTOMATIC STATUS WHEN
REQUIRED IN CONSTRUCTION AGREEMENT WITH YOU**

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

A. Section II – Who Is An Insured is amended to include as an additional insured any person or organization for whom you are performing operations when you and such person or organization have agreed in writing in a contract or agreement that such person or organization be added as an additional insured on your policy. Such person or organization is an additional insured only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by:

1. Your acts or omissions; or
2. The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for the additional insured.

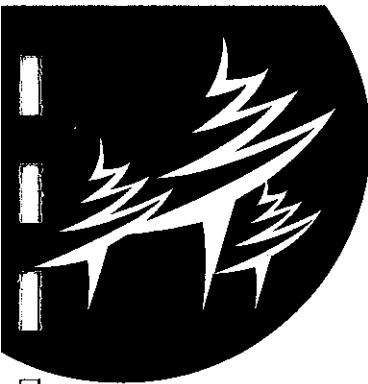
A person's or organization's status as an additional insured under this endorsement ends when your operations for that additional insured are completed.

B. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to:

1. "Bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of, or the failure to render, any professional architectural, engineering or surveying services, including:
 - a. The preparing, approving, or failing to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders or drawings and specifications; or
 - b. Supervisory, inspection, architectural or engineering activities.
2. "Bodily injury" or "property damage" occurring after:
 - a. All work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the additional insured(s) at the location of the covered operations has been completed; or
 - b. That portion of "your work" out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as a part of the same project.





Evergreen Solutions, LLC

2878 Remington Green Circle - Tallahassee, Florida 32308
850.383.0111 - fax 850.383.1511

October 10, 2016

Mr. Wes Wagner
Department of the County Clerk
729 Maple Street
Hillsboro, Missouri 63050

RE: AFFIDAVIT

Dear Mr. Wagner:

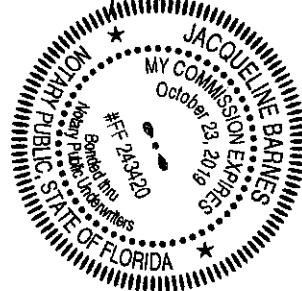
As Executive Vice-President of Evergreen Solutions, I, Dr. Jeff Ling, certify that Evergreen does not own any real or personal property in Jefferson County.

SIGNATURE: 

Subscribed and sworn to before me

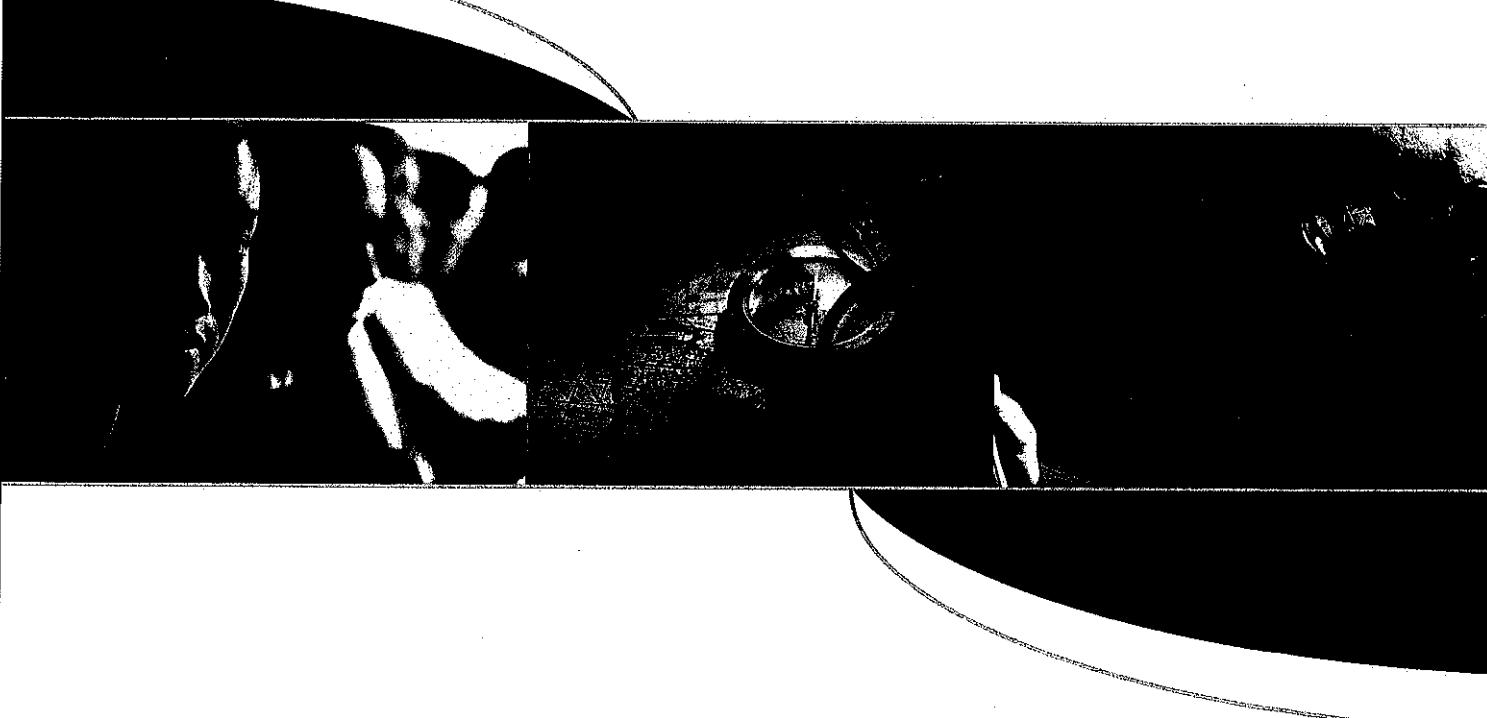
This 10th day of October, 2016

My commission expires 10/23/19, 2019.



A Proposal to Conduct a
Classification and Compensation Study
for Jefferson County, MO

ORIGINAL



Evergreen Solutions, LLC

October 12, 2016

A Proposal to Conduct a Classification and Compensation Study for Jefferson County, MO

Submitted to:

**Department of the County Clerk
of Jefferson County
729 Maple Street
Hillsboro, Missouri 63050**

Submitted by:



**Evergreen Solutions, LLC
2878 Remington Green Circle
Tallahassee, Florida 32308
(850) 383-0111 (phone)/ (850) 383-1511**

October 12, 2016



Evergreen Solutions, LLC

2878 Remington Green Circle - Tallahassee, Florida 32308
850.383.0111 - fax 850.383.1511

October 10, 2016

Department of the County Clerk
of Jefferson County
729 Maple Street
Hillsboro, Missouri 63050

To Whom it May Concern:

Evergreen Solutions, LLC is pleased to submit this proposal to conduct a Classification and Compensation Study for Jefferson County. Our response is based on our review of the Request for Proposal, our knowledge of the Missouri labor market, our experience working with hundreds of local governments and other public sector organizations, and our knowledge of best practices in human resources management.

Evergreen Solutions was formed 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, municipalities, and school districts, across the country, including Missouri (#W03458). Evergreen is also licensed to conduct business in the State of Missouri (Charter No. 87744).

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 45 states. In the State of Missouri, Evergreen has worked with the following public sector clients in a variety of human resource capacities: Jefferson County; St. Charles County; City of Branson; City of Lee's Summit; City of Columbia; Liberty County School District No. 53; Missouri Southern State University; and Missouri Western State University.

In other states, Evergreen has worked with the following local government clients in providing work similar in scope to the services being requested: Sedgwick County, KS; City of Pittsburgh, PA; City of Kalamazoo, MI; Blount County, TN; Mahoning County, OH; San Miguel County, CO; City of Manitou Springs, CO; Denton County, TX; Travis County, TX; Fort Bend County, TX; City of Fredericksburg, TX; City of Gonzales, TX; City of Fate, TX; City of Austin, TX; City of Mont Belvieu, TX; City of Rowlett, TX; City of Pearland, TX; City of Seguin, TX; City of Pflugerville, TX; City of Sunset Valley, TX; City of Amarillo, TX; City of Temple, TX; City of Sachse, TX; City of Buda, TX; City of Farmers Branch, TX; Town of Little Elm, TX; City of Santa Fe, NM; City of Carlsbad, NM; City of Page, AZ; Town of Sahuarita, AZ; City of Salem, OR; Kent County Levy Court, DE; Allegany County, MD; Tri-County Council for Southern Maryland; City of Annapolis, MD; City of Fredericksburg, VA; City of Hyattsville, MD; County of Culpeper, VA; Gloucester County, VA; Essex County, VA; Spotsylvania County, VA; Loudoun County, VA; Isle of Wight County, VA; Louisa County, VA; City of Suffolk, VA; City of Newport News, VA; New Hanover County, NC; Guilford County, NC; Gaston County, NC; Duplin County, NC; Charleston County, SC; Berkeley County, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; City of Lancaster, SC; City of Chester, SC; City of Columbia, SC; City of Mauldin, SC; City of Fairhope, AL; Forsyth County, GA; Lumpkin County, GA; City of Douglasville, GA; City of Garden City, GA; City of Savannah, GA; City of Tybee Island, GA; City of Alpharetta, GA; City of Roswell, GA; City of Brookhaven, GA; City of Kingsland, GA; Manatee County, FL; Seminole County, FL; Charlotte County, FL; Escambia County, FL; Miami-Dade County, FL; Osceola County, FL; Gulf County, FL; Citrus County, FL; Monroe County, FL; Highlands County, FL; Bay County, FL; City of Hollywood, FL; City of Ft. Myers, FL; City of Dania Beach, FL; City of St. Petersburg, FL; City of Panama City, FL; City of Fort Walton Beach, FL; City of Sebring, FL; City of Winter Park, FL; City of Palm Beach Gardens, FL; City of Coral Springs, FL; City of Ocala, FL; and many others. Information regarding the services provided to some of these clients can be found in Chapter 3 of our proposal.

The Evergreen Team has considerable expertise in conducting classification and compensation studies and similar human resources work for local governments and other public sector organizations throughout the country. Specific information about the qualifications of our proposed project team can be found in Chapter 2 of our proposal. Detailed resumes are available upon request.

Evergreen has focused on the following human resource services: classification and compensation studies; salary and benefits surveys; performance appraisal system design; recruitment, hiring, and retention studies; strategic and workforce planning; staffing and efficiency studies; and labor pool availability.

Through our experiences in conducting this wide range of projects, we have gained the knowledge of every aspect of the management and operations involved in local government human resources. As a result, our team knows how critical an effective classification and compensation system is in the overall operation of a proficient and progressive County. 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 classification and compensation study 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 Evergreen's approach 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, County administrators, department heads, and employees need to be involved in each step of the process. This is a critical component of our communication plan.
- 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 Executive Vice-President of Evergreen Solutions, LLC, I am authorized to commit our firm contractually to this assignment. We have reviewed your terms and conditions and we acknowledge that we would be able to work within your requirements. As required, we have attached a copy of the RFP which includes signatures on all of the forms.

We appreciate this opportunity and commit to you our best effort. 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
Executive Vice-President
Evergreen Solutions, LLC

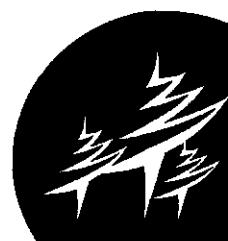


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Chapter 1

Firm's Profile



Evergreen Solutions, LLC

1.0 Firm's Profile

Evergreen Solutions is well qualified to conduct a Classification and Compensation Study for Jefferson County due to our experience in providing these services to hundreds of local governments and other public sector organizations across the country, including Missouri. In this chapter we include a brief profile of our firm as well as our experience providing the work being requested. A list of similar work we have conducted or are on currently on contract to conduct is included in **Chapter 3** of our proposal. A list of our proposed project team, including the qualifications of the Project Director who will serve as Evergreens primary contact through all phases of the project.

1.1 Firm's Profile

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 provide a modern, practical alternative to the typical consulting options. The firm is made up of management and information technology 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, including Missouri (#87744). Contact information for Evergreen Solutions is: 2878 Remington Green Circle, Tallahassee, Florida, 32308, (850) 383-0111 (ph), (850) 383-1511 (fax), and jeff@consultevergreen.com.

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: classification and compensation studies; market and benefits surveys; 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.





1.2 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 local government 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 classification and compensation studies for local governments and other public sector organizations throughout the country, including Missouri;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant Missouri 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 45 states throughout the country.

Exhibit 1-1 includes a 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.



Exhibit 1-1
Select List of Local Government Clients

Blount County, TN	City of Fate, TX	City of Plantation, FL
City of Evanston, IL	City of Buda, TX	City of Maitland, FL
Mahoning County, OH	City of Amarillo, TX	City of Holmes Beach, FL
Jefferson County, MO	City of Fredericksburg, TX	City of St. Petersburg, FL
City of Branson, MO	City of Farmers Branch, TX	City of Sarasota, FL
City of Lee's Summit, MO	City of Seguin, TX	City of Sebring, FL
St. Charles County, MO	City of Mont Belvieu, TX	City of Lake City, FL
Sedgwick County, KS	City of Sunset Valley, TX	City of Cape Coral, FL
City of Pittsburgh, PA	City of Temple, TX	City of Largo, FL
City of Kalamazoo, MI	City of Austin, TX	City of Hollywood, FL
Davie County, NC	City of Rowlett, TX	City of Gainesville, FL
Guilford County, NC	City of Pflugerville, TX	City of Winter Park, FL
New Hanover County, NC	City of Sachse, TX	City of Sunny Isles Beach, FL
Gaston County, NC	City of Santa Fe, NM	City of Punta Gorda, FL
Lee County, NC	City of Carlsbad, NM	City of Deltona, FL
Duplin County, NC	City of Tucson/Pima County, AZ	City of Kissimmee, FL
Alleghany County, MD	City of Page, AZ	City of St. Cloud, FL
City of Hyattsville, MD	City of Gilbert, AZ	City of Bartow, FL
City of Annapolis, MD	Town of Sahuarita, AZ	City of Orange City, FL
Kent County Levy Court, DE	City of Salem, OR	City of Key West, FL
Montgomery County, VA	City of Roswell, GA	City of Temple Terrace, FL
Gloucester County, VA	City of Savannah, GA	City of Doral, FL
County of Culpeper, VA	City of Riverdale, GA	City of Orlando, FL
County of York, VA	City of Kingsland, GA	City of Daytona Beach, FL
Louisa County, VA	City of Alpharetta, GA	Escambia County, FL
Essex County, VA	City of Douglasville, GA	Alachua County, FL
Isle of Wight County, VA	City of Garden City, GA	Highlands County, FL
Spotsylvania County, VA	City of Dahlonega, GA	Bay County, FL
Loudoun County, VA	City of Brookhaven, GA	Manatee County, FL
City of Suffolk, VA	City of Tybee Island, GA	Miami-Dade County, FL
City of Fredericksburg, VA	City of Statesboro, GA	Sumter County, FL
City of Newport News, VA	Forsyth County, GA	Seminole County, FL
City of Lancaster, SC	Lumpkin County, GA	Gadsden County, FL
City of Chester, SC	City of Fairhope, AL	Monroe County, FL
City of Mauldin, SC	City of Panama City, FL	Charlotte County, FL
City of Columbia, SC	City of Panama City Beach, FL	Osceola County, FL
Charleston County, SC	City of Fort Walton Beach, FL	Hernando County, FL
Richland County, SC	City of Delray Beach, FL	Sarasota County, FL
Berkeley County, SC	City of Winter Park, FL	Gulf County, FL
Town of Mount Pleasant, SC	City of Palm Beach Gardens, FL	Martin County, FL
Town of Hilton Head Island, SC	City of Dania Beach, FL	Escambia County, FL
Town of Colchester, VT	City of Bushnell, FL	Village of Pinecrest, FL
City of Fountain, CO	City of Coral Springs, FL	Village of North Palm Beach, FL
San Miguel County, CO	City of Ocala, FL	Town of Juno Beach, FL
City of Manitou Springs, CO	City of Venice, FL	Town of Cutler Bay, FL
Town of Little Elm, TX	City of Tamarac, FL	Town of Palm Beach, FL
Travis County, TX	City of North Miami Beach FL	Town of Jupiter, FL
Denton County, TX	City of Plant City, FL	Town of Ponce Inlet, FL
Fort Bend County, TX	City of Sunrise, FL	



Chapter 2

Proposed Project Team



Evergreen Solutions, LLC

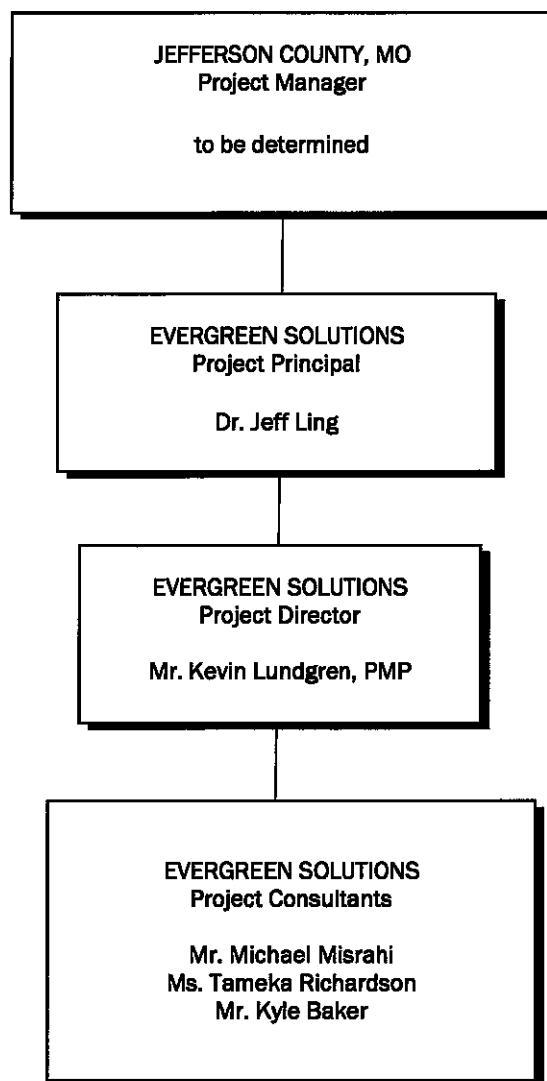
2.0 *Proposed Project Team*

In this chapter we provide you with the qualifications of our proposed project team. Detailed resumes are available upon request.

2.1 Proposed Project Team

Exhibit 2-1 Proposed Project Management Organization and Personnel Assignments

Exhibit 2-1 shows our proposed project management organization and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the classification and compensation study so that there will be no confusion as to who is responsible for any aspect of this engagement.



Jefferson County (County) 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 County'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's Project Principal is always a senior leader in our firm, most often a Vice President or higher. The Project Principal will have contractual authority over the contract, and will be our top level of project responsibility.

Evergreen Solutions Project Director. Evergreen designates as Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the CPM. The Project Director will have the most frequent contact with the County 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 distribute and collect JATs and MITs, conduct focus groups and orientation sessions, collect the data for the salary survey, review and revise job descriptions, and prepare draft and final reports.

2.2 Key Staff

The following paragraphs provide summaries of each team member's qualifications and experience related to his or her role in the Compensation and Classification Study for Jefferson County. As required in the RFP, we have included the percentage of time each staff member will spend on the project in parentheses under their name.

Project Principal
Dr. Jeff Ling
(15 percent)

Dr. Ling is Executive Vice-President of Evergreen Solutions and has been with the firm since its inception. He has more than 20 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:

- Classification/Compensation – He developed the methodology and techniques for organizations to employee 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. Some of the local government clients that he has worked with, or is currently on contract to work with, include: Jefferson County, MO; St. Charles County, MO; City of Branson, MO; City of Lee's Summit, MO; Sedgwick County, KS; City of Pittsburg, PA; County of Allegheny, PA; Blount County, TN; Mahoning County, OH; City of Rowlett, TX; City of Seguin, TX; City of Fate, TX; City of Austin, TX; City of Seguin, TX; City of Sachse, TX; City of Pearland, TX; City of Mont Belvieu, TX; City of Gonzales, TX; City of Sunset Valley, TX; City of Fredericksburg, TX; City of Temple, TX; City of Buda, TX; City of Farmers Branch, TX; City of Amarillo, TX; City of Pflugerville, TX; Denton County, TX; Travis County, TX; Ft. Bend County, TX; Town of Little Elm, TX; City of Carlsbad, NM; City of Santa Fe, NM; Town of Sahuarita, AZ; City of Page, AZ; San Miguel County, CO; City of Manitou Springs, CO; Tri-County Council for Southern Maryland; Allegany County, MD; City of Annapolis, MD; City of Hyattsville, MD; Brunswick County NC; Guilford County, NC; Gaston County, NC; New Hanover County, NC; Gloucester County, VA; Loudoun County, VA; Spotsylvania County, VA; County of Culpeper, VA; County of York, VA; Essex County, VA; City of Suffolk, VA; Charleston County, SC; Berkeley County, SC; City of Chester, SC; City of Lancaster, SC; City of Mauldin, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; City of Kingsland, GA; City of Roswell, GA; City of Brookhaven, GA; City of Garden City, GA; City of Savannah, GA; City of Douglasville, GA; City of Alpharetta, GA; Forsyth County, GA; Lumpkin County, GA; City of Fairhope, AL; Town of Colchester, VT; City of Kalamazoo, MI; City of Santa Fe, NM; Charlotte County, FL; Osceola County, FL; Escambia County, FL; Manatee County, FL; Highlands County, FL; Seminole County, FL; Monroe County, FL; City of Delray, FL; City of Ocala, FL; City of Sebring, FL; City of Kissimmee, FL; City of Tamarac, FL; City of Bartow, FL; City of Palm Beach Gardens, FL; City of Winter Park, FL; City of Lake City, FL; and many others.



- 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
Mr. Kevin Lundgren,
PMP
(40 percent)

Mr. Lundgren, PMP, is a Manager at Evergreen Solutions with extensive experience in all aspects of public sector project management both as an employee for several state agencies and as a consultant for several firms specializing in public sector projects. He is currently managing several human resources project specializing in compensation, classification, and benefit analysis.

As a Project Manager, Mr. Lundgren has led several teams in the implementation of software systems to assist public sector agencies in performing their core functions more efficiently and effectively. His areas of specialization include, fishing and hunting licenses systems; vessel registration systems; procurement systems; public assistance fraud detection; email conversion; telephone system refresh; medical providers applications systems; state retirement systems; court case filing systems, and many others.

Some of Mr. Lundgren's software development projects include the Go Outdoors Georgia Recreational License and Vessel Registration System; MyFloridaMarketPlace – the state of Florida's Procurement System; Florida Department of Financial Services' Public Assistance Fraud Automated Investigative Management system; Florida Department of Health Children's Medical Services Provider Managements System; State of Louisiana Employee Retirement System; and State of Texas Court Case Filing System.

Mr. Lundgren has served, or is serving as the Project Director on the Evergreen Team for the following public sector projects: a Job Classification and Compensation Study for the City of Salem, OR; a Classification and Compensation Pay Plan for the City of Amarillo, TX; a



Classification and Compensation Study for the City of Pflugerville, TX; Comprehensive Compensation and Benefits Study for City of Sachse, TX; a Classification and Compensation Study for the City of Gonzales, TX; a Compensation and Classification Study Update for the Denton County Fresh Water Supply District No. 6 and No. 7, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Classification and Compensation Plan Update for the City of Temple, TX; a Pay and Classification Study for the City of Fredericksburg, TX; Employee Compensation Consulting Services for Fort Bend County, TX; a Compensation Study for the County of York, VA; a Classification and Compensation Plan Update for City of Kissimmee, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation Study for Osceola County, FL; a Compensation and Benefits Study for the City of DeLand, FL; a Pay and Classification Study for Bay County, FL; a Compensation and Classification Study for the City of Ft. Myers; a Compensation Study for the City of Sebring, FL; a Comprehensive Pay Plan Study for the City of Ormond Beach, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Compensation and Classification Study for the City of Lake City, FL; a Salary Survey for the City of Holmes Beach, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for Gulf County, FL; a Pay and Classification Study for Martin County, FL; a Salary Survey for the Pasco County Sheriff's Office, FL; a Classification and Compensation Study for the Sarasota Bay Estuary Program, FL; a Compensation Salary Study Review for Davidson County Transit Organization, TN; and an Employee Compensation and Classification Study for Mahoning County, OH.

Mr. Lundgren holds a Master's Degree in Public Administration and a Bachelor's Degree in Economics from Florida State University.

Project Consultant
Mr. Michael Misrahi
(15 percent)

Mr. Misrahi is a Consultant at Evergreen Solutions. He possesses an academic background in labor relations studies, which is coupled with professional experience analyzing qualitative data. His qualitative and quantitative skills are applied at Evergreen with regard to various analyses of human resources.

Mr. Misrahi's compensation and classification consulting work with Evergreen includes:

- analyzing market survey data to create an analytical picture of where a given organization stands relative to the external market, focusing on competitiveness in compensation plans;
- working intricately with project managers and team members to create and conduct salary, benefit, and ERP-related surveys for client organizations; and
- utilizing job assessment tools to analyze the current state of a classification within an organization with respect to its pay, job description, and job title.



Mr. Misrahi's most recent public sector projects include: a Classification and Compensation Study for San Miguel County, CO; a Pay for Performance and a Salary Survey for City of Mont Belvieu, TX; a Comprehensive Compensation and Benefits Study for the City of Sachse, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; a Classification and Compensation Study for the City of Seguin, TX; a Comprehensive Compensation and Benefits Study for City of Rowlett, TX; a Compensation Study for Town of Sahuarita, AZ; a Classification and Compensation Study for Douglasville, GA; a Compensation and Benefits Study for the City of St. Cloud, FL; a Classification and Compensation Study for the City of Sebring, FL; a Compensation and Classification Study for the City of Sarasota, FL; a Compensation Study for the City of Osceola, FL; Classification and Compensation Services for the City of Dunedin, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for the City of Doral, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Benefits Study for the City of Key West, FL; a Pay and Classification Study for Bay County, FL; a Compensation and ERP Study for Miami-Dade County, FL; a Pay and Classification Study for Gulf County, FL; Compensation Consultant Services for the City of Coral Springs, FL; a Salary Study for Highlands County, FL; a Compensation Study for Sarasota County, FL; a Salary and Benefits Review for Hernando County, FL; a Pay and Classification Study for Martin County, FL; a Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; an Employee Engagement Survey for the City of Daytona Beach, FL; a Compensation Salary Study Review for Davidson Transit Organization, TN; a Classification, Compensation, and Benefits Survey for Kent County Levy Court, DE; a Compensation Study for the County of York, VA; a Classification and Compensation Study for Loudoun County, VA; and a Salary Survey for the State Employees Association of North Carolina (SEANC).

Mr. Misrahi has an MBA and a Bachelor's Degree in History from Florida State University.

Project Consultant
Ms. Tameka
Richardson
(15 percent)

Ms. Richardson is a Senior Analyst at Evergreen Solutions. She has over 15 years of experience providing services to federal, state and local governments and the private sector in performing accounting and procurement comparative analyses. Her experience includes research, auditing, statistical analyses of an organization's accounting and purchasing data and procurement procedures, data collection and assessment. As a result of her extensive work in the area of research and data collection, she is proficient in the preparation of statistical reporting and in the analysis and interpretation of large data sets for various organizations.

Recent public sector projects that Ms. Richardson has been involved with include: a Classification and Compensation Study for Sedgwick County, KS; a Classification and Compensation Study for San Miguel County, CO; a Compensation Survey for the Texas City Management Association; Development of a Classification and Compensation Pay



Plan for the City of Amarillo, TX; a Human Resource Department Assessment for the City of Buda, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Salary Market Study and Personnel Systems Study for Virginia's Region 2000 Local Government Council; a Classification and Compensation Study and Benefit Survey for Cape Fear Public Utility Authority, NC; a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, NC; a Classification and Compensation Study for the Town of Hilton Head Island, SC; Classification and Compensation Services for the City of Dunedin, FL; Compensation Consultant Services for the City of Coral Springs, FL; a Compensation Study for the City of Hollywood, FL; a Classification and Compensation Study for the City of Lake City, FL; a Compensation and Classification Study for the City of Cocoa, FL; a Classification and Compensation Study for the City of Ft. Myers, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Pay and Classification Study for the City of Deerfield Beach, FL; a Salary Survey for the City of Holmes Beach, FL; a Compensation Study for Lake County, FL; a Pay and Classification Study for Martin County, FL; a Pay and Classification Study for Gulf County, FL; Compensation and Classification Study Services for Monroe County, FL; a Compensation Analysis for Manatee County, FL; a Compensation and Classification Study for Alachua County, FL; Job Audits for the City of Gainesville, FL; a Classification and Compensation Study for the City of Destin, FL; Human Resource Consulting Services to the City of Orlando, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation and Benefits Study for the City of DeLand, FL; a Comprehensive Pay Plan Study for the City of Plant City, FL; Compensation and Classification Systems Consulting Services for the Collier County Sheriff's Office, FL; and a Salary Survey (Compensation Plan Update) for the Town of Ponce Inlet, FL.

Ms. Richardson has an MBA and a Bachelor's Degree in Accounting.

Project Consultant
Mr. Kyle Baker
(15 percent)

Mr. Baker is a Senior Analyst at Evergreen Solutions. His background has been in the study of labor markets and education policy evaluations using techniques in econometric modeling which allow him to communicate and engage substantively through data and design.

Mr. Baker's role with Evergreen has focused on compensation and classification studies utilizing market data. His primary responsibilities include:

- working closely with project teams and project managers in coordinating salary and benefit survey initiatives;
- evaluating market data from surveys, government agencies, and private sector databases to provide comprehensive reviews of compensation packages; and
- designing clear and concise reports and displays to communicate nuanced results.



Recent public sector projects that Mr. Baker has been involved with include: a Job Classification and Compensation Study for the City of Salem, OR; a Classification and Compensation Study for San Miguel County, CO; a Compensation Study for the County of York, VA; a Classification and Compensation Study for Loudoun County, VA; a Classification and Compensation Plan Update for the City of Temple, TX; a Classification and Compensation Study for the City of Gonzales, TX; a Classification and Compensation Study for the City of Pflugerville, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; Development of a Classification and Compensation Pay Plan for the City of Amarillo, TX; Classification and Compensation Study Services for Hillsborough Community College, FL; a Comprehensive Pay Plan Study for the City of Ormond Beach, FL; a Salary Survey for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Sebring, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Compensation Study for the City of Ft. Myers, FL; a Salary Survey for the City of Holmes Beach, FL; a Compensation and Benefits Study for the City of DeLand, FL; a Comprehensive Pay Plan Study for the City of Plant City, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation Study for Lake County, FL; and a Salary Survey (Compensation Plan Update) for the Town of Ponce Inlet, FL.

Mr. Baker holds a Master of Science in Economics and a Bachelor's Degree in Economics and Political Science with a Minor in Mathematics from Florida State University.



A team of experienced analytical and clerical support staff will contribute to this study, as needed.



Chapter 3

Firm's Qualifications



Evergreen Solutions, LLC

3.0 Firm's Qualifications

In this chapter we include a list of similar work we have conducted or are on currently on contract to conduct, our current workload, and what our clients are saying about our consulting work.

3.1 Select Relevant Experience

Because Evergreen has conducted hundreds of projects that are similar in scope to the services being requested, we have included only a sample of some of our more recent local government work. We also include our public sector work in the State of Missouri as it relates to the services being requested.

Comprehensive Compensation and Classification Study Jefferson County, Missouri

In 2010, 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.



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 Missouri Southern State University

Missouri Southern State University requested professional assistance to develop a comprehensive classification and compensation plan for non-faculty and non-exempt positions. Initially, the University suggested a two-phased study; however, Evergreen Solutions proposed cost and time advantages through consolidation of the two phases and the University acknowledged the benefit of that recommendation. The results of the study were a comprehensive compensation plan that fills a void of over 20 years for the University. Objectives of the study included the development of a fair and equitable system that promotes employee retention and enhances the University's attraction for prospective applicants.



Market Salary Survey Missouri Western State University

Evergreen assisted Missouri Western State University in conducting a comprehensive market salary survey of all non-faculty jobs, including market comparisons at the local, regional, state, and national levels. Evergreen Solutions consultants worked with the University's Compensation and Classification Committee to select benchmark job titles and market peer organizations to survey. Once data was collected using the custom salary survey, Evergreen Solutions provided detailed and comprehensive recommendations for revision and update of the University's pay plans, including projected costs for implementation. Finally, Evergreen Solutions staff provided compensation administration guidelines for continued administration of the updated pay plans.



Compensation and Classification Study Liberty School District No. 53, Missouri

Evergreen Solutions was retained by the Liberty County School District No. 53 (District) to conduct a Compensation and Classification Study for non-certified staff (i.e., 862 support staff). Evergreen assisted the District in reviewing and analyzing the current support staff compensation and benefit structure and made recommendations for improvements to the existing system(s) to ensure that the alignment with the Kansas City labor market were sufficient to recruit and place qualified applicants for these positions that include Facilities & Maintenance, General Office Support, Kid's Zone, Medical, Nutrition Services, Para, Purchasing & Distribution, Security, Teacher Support, Technology, Therapist (Physical, Occupational, and Recreational) and Transportation. Evergreen considered the total compensation package received by support staff employees with the District as it related to both the external and internal market and provided an analysis of compensation policies and practices and made recommendations to formalize a long-term compensation strategy.



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.



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.



Employee Compensation and Classification Study Mahoning County, Ohio

Evergreen Solutions is retained by Mahoning County to conduct an Employee Compensation and Classification Study for all the County's 1,746 employees. Employees will participate in focus groups, interviews, and a job analysis will be conducted to determine the best classifications for the work performed. Pay ranges will further be analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen consultant's will also review and update existing job descriptions and determine FLSA designations for each job title/classification.

Evergreen will design 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 fall outside of a designated range. In the end, recommendations will be made to improve the fairness and equity in the current 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.



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.



Compensation Analysis City of Hyattsville, Maryland

Evergreen Solutions is retained by the City of Hyattsville to conduct a Compensation System Analysis. Market position will be determined through a salary survey and strategic positioning recommendations will be made with the goal of providing the City a more equitable compensation system. Evergreen will develop an approximate 25-step salary range for all employees; an executive pay scale and pay grades assignments for seven senior director classifications; and a calculation for promotions that can be used for all employees. **Note:** This project is nearing completion.



Classification and Compensation Plan Review City of Annapolis, Maryland

Evergreen Solutions is engaged with the City of Annapolis to conduct a Classification and Compensation Plan Review. The primary objectives of the study are 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 Desk Audit Tri-County Council for Southern Maryland

Evergreen Solutions was retained by the Tri County Council for Southern Maryland to conduct a detailed classification analysis of its employees. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels.



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.



Pay and Classification Study Isle of Wight County, Virginia

Evergreen Solutions was hired by Isle of Wight County to conduct a Pay and Classification Study that will provide internal equity and will further allow the County to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants assisted the County in reviewing and updating existing job descriptions; obtained market data to update the County's classification plan to reflect the current market; reviewed current classification grade methodology; and assisted in reviewing the County's current salary administration guidelines. Evergreen made recommendations on implementing strategies that will pay employees for additional duties, education, and qualifications, to ensure that the compensation plan remains competitive in future years.



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.



Salary Plan Review City of Suffolk, Virginia

Evergreen Solutions was retained 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.



Job Comparability Study City of Newport News and Newport News Sheriff's Office, Virginia

Evergreen Solutions was retained by the City of Newport News and the Newport News Sheriff's Office to conduct a Job Comparability Study of selected positions. The project involved assessing the comparability of NNSO ranking positions (Deputy, Sergeant, Lieutenant, Captain, Major, and Deputy Chief) against similar positions in the Newport News Police Department, Parks Department, and Adult Corrections Department. As an additional element of the analysis, Evergreen conducted a market salary survey of regional sheriff's offices to assess the competitive position of NNSO against regional peers.



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 hierachal 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 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.



Classification and Compensation Study and Benefits Survey New Hanover County, North Carolina

Evergreen 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's 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 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 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.



Comprehensive Position Classification and Compensation Study Gaston County, North Carolina

Evergreen Solutions is 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 is to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allows the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen's consultants will perform a comprehensive review of the County's classification and compensation system which includes conducting an internal equity analysis of employee salaries.

Evergreen will provide recommendations to create a system that not only aligns with the State of North Carolina's substantially equivalency requirement, but allows for flexibility so as not to inhibit those departments that are not required to have this alignment.



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 in 2012 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.



Classification and Compensation Study Berkeley County, South Carolina

Evergreen Solutions is retained by Berkeley County to conduct a Classification and Compensation Study. Evergreen's consultants will review the County's current classification and compensation plan and will recommend a consistent and competitive market position that the County can maintain based on a salary survey results from peer organizations. Evergreen will recommend 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 will provide recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



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.



**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.



**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 under-utilized; 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 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.



Compensation and Benefits Study and Analysis City of Dahlonega, Georgia

Evergreen Solutions was engaged with the City of Dahlonega 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 and Analysis 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 analyze 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 recommend 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 and Staffing Analysis of Police Department 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 as well as a Staffing Analysis of the Police Department. 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.

For the staffing analysis, Evergreen's consultants reviewed the staffing needs of the City's Police Department in terms of delivering quality



services to its citizenry. Evergreen compared staffing to similar police departments in the surrounding area as well as industry best practices, and made recommendations for staffing improvements, as needed.



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 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 will align with the results of the study.

Evergreen provided recommendations to the overall classification, compensation, and performance plan that would provide 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 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 & Compensation 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).



Classification and Compensation Study City of Winter Park, Florida

Evergreen Solutions assisted the City of Winter Park's Human Resources Department with conducting a comprehensive classification and compensation study for all full-time employees. The project centered on providing the City with a revised system that was characterized by internal and external equity. To ensure internal equity, Evergreen utilized its Job Assessment Tool (JAT) and Management Issues Tool (MIT) to properly classify work performed and highlight issues to be addressed by management. Employees at all levels were also provided a forum to voice concerns with the current system through focus groups. Evergreen also selected benchmarks and peer organizations to survey for wages in comparison to the market. This information was combined with the job analysis to provide a comprehensive solution. The recommended solutions were costed out and presented to the City for review.



Compensation, Classification, and Benefits Study City of Palm Beach Gardens, Florida

The City of Palm Beach Gardens was on contract with Evergreen Solutions to conduct a comprehensive Compensation and Classification Study to assess the city's internal and external equity. The City had established track record of regular studies of this nature and seeks up-to-date competitive salary and benefits information from both the private and public sector. A salary survey of peer organizations in the local and regional market, to include benefits and total compensation, was conducted to ascertain the City's relative market position. The City maintained the objective of being among the compensation leaders in Palm Beach County, and regular evaluation of this kind was essential in achieving this progressive goal. The study included a complete classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. The study concluded with a series of findings and recommendations in a written report that was designed to identify and recommend resolution of any inequities in the system and, if necessary, update the existing classification structure. The City had gone through a considerable reduction in force, which had caused many responsibilities to be shuffled. **Note:** Evergreen was again hired in early 2016 to conduct a Compensation and Classification Plan Update.



Comprehensive Classification and Compensation Study City of Panama City, Florida

Evergreen was retained by the City of Panama City to conduct a Comprehensive Classification and Compensation Study for 545 non-union positions/employees, including approximately 79 firefighters, 92 police officers, and 5 elected officials in 190 job classifications. Employees participated in focus groups, interviews, and a 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. Evergreen reviewed the City's current performance evaluation system, tools and procedures, and made recommendations for necessary changes to the system.

Recommendations were also provided to improve fairness and equity of all jobs within the City. Select City 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 were accomplished. Evergreen made recommendations regarding enhancements to the City's current performance evaluation system and provided the City with a performance evaluation tool.



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 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.*



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.



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;
- 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.



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.



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.



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.



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.



Classification and Compensation Pay Plan Study City of Amarillo, Texas

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan. 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.



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.



**Human Resources Department Assessment (included a Classification and Compensation Study)
City of Buda, Texas**

Evergreen was engaged with the City of Buda to conduct a Human Resources Department Assessment. Evergreen's consultants provided a job analysis questionnaire and procedures for future updating and new position creation and developed and fully defined a systematic procedure for evaluating positions using the "point factor method". A worksheet was developed for departments to request a job evaluation for upgrades within a position or for a new position for submission to Human Resources to ensure that job titles were consistently used on job descriptions and the pay plan.

Evergreen further created a new cost effective, affordable compensation structure and management plan that was systematically and equitably acknowledge and rewarded an employee's performance and skills. Evergreen designed a compensation program that included a description and justification of the pay philosophy, a completed pay structure, and rules for moving employees through the pay structure based on their increasing contributions in support of the City. Evergreen consultant's gathered actual salary data from market surveys, local governmental agencies, benchmarked cities, and other appropriate data, as deemed necessary. The recommended compensation structure included a proposed training/career progression plan, including documentation as appropriate, and a plan that rewards employee performance fairly and equitably, with measures that can be documented.



**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
San Miguel County, Colorado**

Evergreen Solutions was engaged with San Miguel County to conduct a Classification and Compensation study, including wages and benefits, for full-time and part-time employees of San Miguel County and the Regional Housing Authority. 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



Job Classification and Compensation Study City of Salem, Oregon

Evergreen Solutions is engaged with the City of Salem to conduct a Job Classification and Compensation Study. Evergreen will review the City's current classification specifications to analyze knowledge, skill, ability, education, experience, relevance, and hierarchical consistency as well as analyze unrepresented classifications and propose where broad banding or creating job series would be beneficial to achieve alignment of similar positions and create a job related hierarchy.

Evergreen will make "market comparisons" for unrepresented positions based on the primary labor market for those classifications and will complete internal salary relations analysis including the development of appropriate internal relationship guidelines. Evergreen's consultants will analyze compression and make recommendations that take into account internal equity as well as market factors (external equity).

In the end, Evergreen will train City staff on the methodology used to systematically assess job classifications in order to maintain internal compensation equity when adding, changing, or deleting classifications and will provide written documentation of assessment methodology and tools necessary to support City staff for ongoing maintenance and administration of the recommended classification and compensation plan.



3.2 Current Workload

We at Evergreen Solutions pride ourselves on providing continuity of service throughout the duration of any project we are on contract to complete. Our workload is never too heavy so as to comprise the quality of any project we are working on or place any undue stress on our project team. We believe in providing the most professional and highest quality services to our postsecondary education clients.

Should Evergreen Solutions be awarded this contract to conduct a Classification and Compensation Study for Jefferson County, we give you our word that our consultants will be available to staff whenever they are needed during the course of the project to answer any questions regarding project deliverables. We are committed to do the very best job we can for you so that once the project is completed your staff will feel that we have given them the highest quality of service in a timely fashion.

The projects that Evergreen is currently on contract to complete are listed below. **Note:** The majority of these projects are either in the final stages of completion or are being directed by other Evergreen consultant teams.



- City of Page, AZ – Classification Study and Compensation Survey
- Berkeley County, SC - Classification and Compensation Study
- Gaston County, NC – Comprehensive Position Classification and Compensation Study
- City of Hyattsville, MD – Compensation Analysis
- Jacksonville Aviation Authority, FL - Compensation and Job Grading Analysis
- City of Salem, OR – Classification and Compensation Study
- Wor-Wic Community College, MD - Job Classification and Compensation Analysis

3.3 What Our Clients Are Saying

The following quotes have been taken from some of our clients as they relate to the human resource management work we have performed.

“Evergreen was able to respond to all questions in a timely manner.”

**Pam Smith, Human Resources Director
Essex County, VA**

“Evergreen’s staff were highly professional and competent.”

**Richard Brown, Personnel Administrator
Richland County Library, SC**

“Evergreen’s staff were highly professional and competent.”

**Jan Coulter, Director, Human Resources Division
Charleston County Park and Recreation Commission, SC**

“Very impressed with the Project Team”

**Meghan Kelly, Personnel Officer
Town of Mt. Pleasant, SC**

“Evergreen staff was very knowledgeable and their presentation was very professional before the Board of County Commissioners.”

**Durwood Bell, HR Position Management Consultant
Guilford County, NC**

“Implemented all of Evergreen’s suggestions.”

**Pat Carson, Personnel Services Director
Forsyth County, GA**



"Very Happy... Will Definitely use Evergreen Again!"

**Jim Harner, Director of Human Resources
City of Roswell, GA**

"Evergreen's staff were very professional and prompt with responses."

**Kim Pendergraft, CPM
Texas City Management Association**

"Evergreen exceeded our expectations."

**Dale Pazdra, Director of Human Resources
City of Coral Springs, FL**

"Evergreen maintained frequent interaction and was very accessible."

"The draft and final products were excellent and staff was flexible on input and feedback."

"Evergreen completed the project within our timeframe."

**Margie Moale, Human Resources Director
City of Plantation, FL**

"Evergreen's Project Director was very accessible."

**Jerry Haines, Human Resources Manager
Hernando County, FL**

"Evergreen was very responsive to questions by staff and Board committee members."

"We would definitely contact Evergreen Solutions for any future studies of this nature as part of any future requests for proposals."

**Janey Stuart, Director of Finance and Human Resources
Florida Board of Bar Examiners**

"Evergreen was very competent, highly professional, and easy to work with."

**Dale Garcia, Former Human Resources Director (Retired)
Manatee County, FL**

"Excellent interaction, responsive, and accessible throughout the project."

**Sheryl Stewart, Human Resources Administrator
City of Palm Beach Gardens, FL**



"Final product was outstanding."

**Randy Swing, President
Association for Institutional Research, FL**

"I would rate the professionalism of staff very high."

**Stacie Mason, Human Resources Director
City of Sarasota, FL**

"Very timely responses."

"Very good people to work with."

**Kim Cherbano, Human Resources Director
Town of Ponce Inlet, FL**

"Evergreen is very easy to work with."

**Lana Bruce, Manager, Workforce Planning
Sarasota County, FL**

"Everyone I was in contact with was extremely professional."

"Evergreen's Project Director responded to requests promptly and made every effort to work with the City's requests."

**Judy Garza, Human Resources Manager
City of Fate, TX**

"I consider the staff to be very professional and highly competent."

"We were very pleased with the final presentation to the City Council. Information was presented in a concise and accurate manner."

**Nona Vogel, Assistant Director of Human Resources
City of Seguin, TX**



Chapter 4

Approach and Work Plan



Evergreen Solutions, LLC

4.0 Approach and Work Plan

In this chapter we provide our understanding of the scope of work; our overall approach and methodology for completing this study; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the scope of services of the Request for Proposal (RFP); and a proposed timeline.

4.1 Understanding of Scope of Services

Evergreen understands that according to the scope of services of the RFP, the County desires an outside consultant perform the following tasks:

1. Job Audit and Analysis

- evaluate current position classifications job descriptions and pay grades; and
- gather necessary employee information through the use of a combination of job analysis questionnaires and group and individual interviews.

Information will be used to analyze the duties and responsibilities of each employee and position to determine the following:

- whether individual employees are appropriately classified;
- whether a position should be moved to a different job classification and/or pay grade;
- whether position titles are appropriate; and
- other recommendations.

2. Job Descriptions

- all job descriptions shall be updated after review of job analysis questionnaires and interviews;
- recommendations shall be made to revise, create or consolidate titles and classifications.
- job descriptions should be established in a standardized format which is ADA and FLSA compliant. County will have review/input as to the final format of job descriptions;



- revised job descriptions should include FLSA exemption tests to determine the appropriate FLSA overtime classification for each position based upon the duties and responsibilities provided in the job description; and
- final job descriptions to be provided to the County, with allowance for one set of revision included in project cost.

3. Final Report Requirements

- methods used to conduct the salary survey results and methodology of job evaluation;
- summarized position comparison data;
- recommended classification plan;
- recommendations for maintaining future market competitiveness; and
- other recommendations.

4. Other Miscellaneous Requirements

- prepare an analysis of the financial impact for the implementation of recommended changes to the compensation plan.
- provide a recommended job evaluation plan that would allow the County to evaluate positions every two (2) years.
- provide administration manual with plan maintenance procedures.
- provide sample documents to be used to communicate the compensation system change to current and future employees, and a summary document to communicate the full compensation system to current and future employees, both to be provided in reproducible hardcopy and electronic format.

4.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Classification and Compensation Study for Jefferson County 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 County's designated Project Manager and the County Executive 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 Solutions 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 must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that spells out 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.

Evergreen Solutions 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.

Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.



Kick Off Meeting	<p>Evergreen Solutions 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 and compensation 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, compensation, and performance appraisal data.</p>
Communication Plan	<p>Communication is a critical component of any position classification and pay plan review. 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> <p>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 Solutions consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.</p> <p>Evergreen Solutions staff conduct one-on-one interviews with department heads and/or senior management (in addition to any other employees the client determines is necessary) to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational</p>



**Job Assessment
Tool and
Management
Issue Tool**

structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.

Another important activity undertaken at this time is the distribution of Evergreen Solutions' 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:

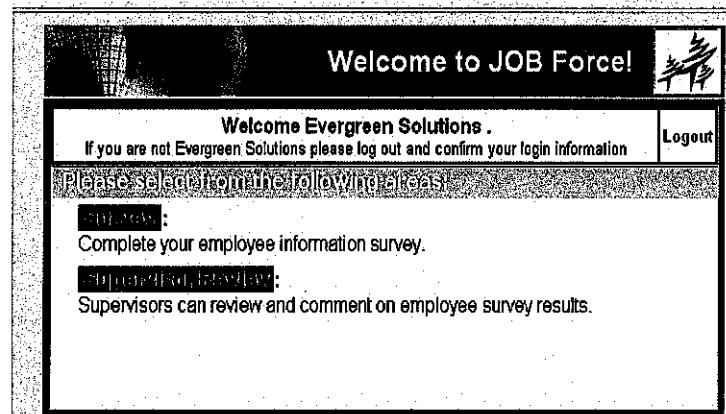
- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

Evergreen Solutions 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 4-1 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 4-1
Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2016

Exhibit 4-2 shows an example of the basic employee demographic information validation that takes place within the JAT. In addition to employee email, Evergreen Solutions collects employee phone information to facilitate contact after the JAT is complete. It is also important for us to have a complete understanding of their work schedule.



Exhibit 4-2
Personal and Job Information

Job Assessment Tool

Basic Personal and Job Information

Personal Information

Contact Information

Name: Evergreen Solutions (1008)

E-mail:

Phone/Extension:

Section 1.0 Job Overview

Job Title: NA

Official Workweek in hours (please identify your official workweek, rather than actual hours worked)

Less than 15 15 - 20 21 - 30 31 - 37.5 40 Greater than 40

Status (please choose one)

Full time Less than full time

Submit and save your responses to this page by clicking below. If you do not have time to complete the entire process at this time, the information you have stored will be available the next time you log in to the site.

Save and Continue

Source: Evergreen Solutions, 2016

Exhibit 4-3 illustrates how Evergreen Solutions 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 Solutions 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 4-3
Job Description and Responsibilities

Job Assessment Tool

Job Description and Responsibilities

Section 2.0 Job Description

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.

Please indicate below the number of people you supervise directly and/or indirectly.

Supervise Directly*

Full-time: _____ part-time, reduced hours, and temporary _____

Supervise Indirectly**

Full-time: _____ part-time, reduced hours, and temporary _____

** Direct supervision is the management or supervision of employees who report work to you and who you evaluate without assistance. Please do not include subcontractors.*

*** Indirect supervision is the management or oversight of employees who report to you through another supervisor who reports directly to you. Please do not include subcontractors.*

Submit and save your responses to this page by clicking below. If you do not have time to complete the entire process at this time, the information you have stored will be available the next time you log in to the site.

Save and Continue

Source: Evergreen Solutions, 2016

Exhibit 4-4 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 Solutions to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.



Exhibit 4-4
Job Functions

Job Assessment Tool

Job Description and Responsibilities

Section 3.0 Job Functions

In the table provided, please include all essential job functions you perform. For every function you list, please note how often you perform the function - Daily, Weekly, Monthly, A Few Times Per Year, or Annually. Then, estimate the total percent of your time spent on each function on an annual basis. Lastly, please check off the five most important functions you perform.

Job Function	Most Important Function (Choose five)	Frequency	% Time Spent on Task
1.	<input type="checkbox"/> Yes	Choose One	
2.	<input type="checkbox"/> Yes	Choose One	
3.	<input type="checkbox"/> Yes	Choose One	
4.	<input type="checkbox"/> Yes	Choose One	
5.	<input type="checkbox"/> Yes	Choose One	
6.	<input type="checkbox"/> Yes	Choose One	
7.	<input type="checkbox"/> Yes	Choose One	
8.	<input type="checkbox"/> Yes	Choose One	
9.	<input type="checkbox"/> Yes	Choose One	
10.	<input type="checkbox"/> Yes	Choose One	
11.	<input type="checkbox"/> Yes	Choose One	
12.	<input type="checkbox"/> Yes	Choose One	
13.	<input type="checkbox"/> Yes	Choose One	
14.	<input type="checkbox"/> Yes	Choose One	
15.	<input type="checkbox"/> Yes	Choose One	

Submit and save your responses to this page by clicking below. If you do not have time to complete the entire process at this time, the information you have stored will be available the next time you log in to the site.

Save and Continue

Source: Evergreen Solutions, 2016



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 Solutions staff during the analysis portion of the project.

Job Evaluation

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.

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.

Compensation

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.

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.

Market Survey

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



	<p>look to include any employers to whom the organization has recently lost employees.</p>
Benchmarks	<p>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.</p>
Targets	<p>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.</p> <p>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.</p> <p>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.</p> <p>Evergreen Solutions 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.</p>



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.

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.

Compensation Administration Guidelines 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.



<p>System Maintenance</p> <p>4.3 Detailed Work Plan</p>	<p>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.</p> <p>Based on client needs and industry best practices, Evergreen Solutions 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.</p> <p>The detailed work plan that Evergreen Solutions proposes to use to conduct the Classification and Compensation Study for Jefferson County is provided in this section. Note: Evergreen understands that approximately 300 full-time employees in 135 job titles will be included in the base study which excludes positions in the Department of Juvenile Justice and the Department of Sheriff. Should the County desire the study to cover these additional employees, Evergreen has provided a cost on the "Price Form" (i.e., page 20 of the RFP) which is included in Chapter 6.</p> <p>Our work plan consists of the following 13 tasks:</p> <ul style="list-style-type: none"> • Task 1: Project Initiation • Task 2: Collect and Review Current Environment Data • Task 3: Evaluate the Current System • Task 4: Develop Compensation Philosophy • Task 5: Evaluate and Build Projected Classification Plan • Task 6: Identify List of Market Survey Benchmarks • Task 7: Identify Approved List of Targets • Task 8: Conduct Market Survey and Provide External Assessment Summary • Task 9: Develop Strategic Positioning Recommendations • Task 10: Conduct Solution Analysis • Task 11: Develop and Submit Draft and Final Reports • Task 12: Develop Recommendations for Compensation Administration • Task 13: Provide Revised Class Descriptions and FLSA Determinations
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Task 1.0 Project Initiation	<p>TASK GOALS</p> <ul style="list-style-type: none"> • Finalize the project plan with Jefferson County (County). • Gather all pertinent data. • Finalize any remaining contractual negotiations. • Establish an agreeable final time line for all project milestones and deliverables. <p>TASK ACTIVITIES</p> <p>1.1 Discuss with the County's Project Manager (CPM) and the County Executive the following objectives:</p> <ul style="list-style-type: none"> • the classification and pay plan study process; • understand mission and current compensation philosophy (if any) of the County; • 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. <p>1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the County and some of the short- and long-term priorities. This activity serves as the basis for assessing where the County is going and what type of pay plan will reinforce current and future goals.</p> <p>1.3 Obtain relevant materials, including:</p> <ul style="list-style-type: none"> • 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), and classification system; • strategic business plans and budgets; and • personnel policies and procedures, and the step placement policies.
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	<p>1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.</p> <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> • Comprehensive project management plan • Comprehensive database of County staff (excluding Juvenile Justice and Sheriff's Department employees) <p>Task 2.0 Collect and Review Current Environment Data</p> <p>TASK GOALS</p> <ul style="list-style-type: none"> • Conduct statistical and anecdotal research into the current environment within the County. • Guide subsequent analytical tasks. <p>TASK ACTIVITIES</p> <p>2.1 Schedule and conduct employee orientation sessions.</p> <p>2.2 Meet with department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.</p> <p>2.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.</p> <p>2.4 Work with the CPM to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.</p> <p>2.5 Review any data provided by the County that may provide additional relevant insight.</p> <p>2.6 Review internal career ladders and make preliminary recommendations to keep positions competitive.</p> <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> • JAT and MIT distribution • Department head interviews • Employee focus groups and orientation sessions
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Task 3.0 Evaluate the Current System	<p>TASK GOAL</p> <ul style="list-style-type: none"> Conduct a comprehensive preliminary evaluation of the existing compensation plan(s) for the County. <p>TASK ACTIVITIES</p> <ol style="list-style-type: none"> Obtain the existing pay structure and compensation philosophy. Review the existing pay structure and look for potential problems to be resolved. Determine the strengths and weaknesses of the current pay plan(s). 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. <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> Review of existing compensation plan(s) Assessment of current conditions <p>TASK GOAL</p> <ul style="list-style-type: none"> Facilitate the development of the compensation philosophy for the County. <p>TASK ACTIVITIES</p> <ol style="list-style-type: none"> Conduct a thorough review of all background materials related to the compensation system for the County. Review information obtained from department head interviews. Make recommendation for compensation philosophy based on input from previous steps. Document accepted compensation philosophy and discuss with the CPM. <p>KEY PROJECT MILESTONE</p> <ul style="list-style-type: none"> Compensation philosophy
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Task 5.0 Evaluate and Build Projected Classification Plan	<p>TASK GOALS</p> <ul style="list-style-type: none"> Identify the classification of existing positions utilizing Evergreen's job evaluation system. Review JAT responses. Characterize internal equity relationships within the County. <p>TASK ACTIVITIES</p> <ol style="list-style-type: none"> Review all draft class specifications with the CPM. Review the work performed by each classification and score. Include an evaluation of supervisory comments. Review JAT scores and identify the classification of positions. Schedule and conduct additional follow up with employees and supervisory and management personnel for jobs where uncertainty exists over data obtained from the JATs. 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 into pay grades. Spacing between jobs would be determined, and each classification would be assigned to a pay grade. The final decision on the minimums and maximums of the pay grades would be determined after the market data have been collected. Review recommendations with the CPM. <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> JAT scores by class Recommended classification changes Preliminary job structure based on internal equity <p>TASK GOAL</p> <ul style="list-style-type: none"> Identify the proper benchmark positions for the external labor market assessment to reach an appropriate number. <p>TASK ACTIVITIES</p> <ol style="list-style-type: none"> Conduct a thorough review of all materials to date, including the employee database, classification listing, interviews, compensation review, and meetings with the CPM.
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**Task 7.0
Identify Approved
List of Survey
Targets**

- 6.2 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to select up to 50 benchmark positions that are representative of the County.
- 6.3 Submit the proposed list of positions to the CPM for review.
- 6.4 Based on the review, make revisions to the benchmark list and finalize consistent with Evergreen's analysis.

KEY PROJECT MILESTONES

- Preliminary list of benchmark classifications
- Final list of benchmark positions for the external labor market assessment

TASK GOAL

- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment.

TASK ACTIVITIES

- 7.1 For each employee group, review with the CPM peer organizations that must be included in the survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary survey.
- 7.2 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the Hillsboro area;
 - economic and budget characteristics; and
 - other demographic data.
- 7.3 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.
- 7.4 Review survey methodology with the CPM and refine survey methodology prior to distribution of survey.
- 7.5 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

- Initial list of survey peers



Task 8.0 Conduct Market Survey and Provide External Assessment Summary	<ul style="list-style-type: none"> • Survey methodology • Final list of survey organizations and contacts <p>TASK GOALS</p> <ul style="list-style-type: none"> • Conduct the external labor market salary survey. • Provide a summary of the survey results to the CPM for review. <p>TASK ACTIVITIES</p> <p>8.1 Prepare a customized external labor market salary survey for approval by the CPM. Discuss questions and categories for the market survey.</p> <p>8.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.</p> <p>8.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.</p> <p>8.4 Collect and enter survey results into Evergreen's electronic data analysis tools.</p> <p>8.5 Validate all data submitted.</p> <p>8.6 Develop summary report of external labor market assessment results.</p> <p>8.7 Submit summary report of external labor market assessment results to the CPM.</p> <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> • Market survey instrument • Summary report of external labor market assessment results <p>Task 9.0 Develop Strategic Positioning Recommendations</p> <p>TASK GOALS</p> <ul style="list-style-type: none"> • Assess the appropriateness of the current compensation philosophy for the County. • Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.
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Task 10.0 Conduct Solution Analysis	TASK ACTIVITIES <ol style="list-style-type: none"> 9.1 Identify the compensation philosophy and accompanying thresholds. 9.2 Using the market salary data collected in Task 8.0 and the classification data reviewed in Task 5.0, determine the proper pay plan for the County. 9.3 Identify highly competitive positions within the County and customize recommendations for compensation where required. 9.4 Produce a pay plan(s) for the County that best meets the needs of County from an internal equity and external equity standpoint. KEY PROJECT MILESTONES <ul style="list-style-type: none"> • Proposed compensation strategic direction, taking into account internal and external equity • Plan for addressing unique, highly competitive positions
	TASK GOALS <ul style="list-style-type: none"> • Conduct analysis comparing JAT values. • Survey results for the benchmark positions. • Produce several possible solutions for implementation. TASK ACTIVITIES <ol style="list-style-type: none"> 10.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan. 10.2 Place all classifications into pay grades based on Task Activity 10.1. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications. 10.3 Create implementation solutions for consideration that take into account the current position of the County as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives. 10.4 Meet with the CPM discuss the potential solutions. 10.5 Determine the best solution to meet the needs of the County in the short-term and long-term. 10.6 Document the accepted solution. KEY PROJECT MILESTONES <ul style="list-style-type: none"> • Initial regression analysis



Task 11.0
Develop and
Submit Draft and
Final Reports

- Potential solutions
- Documented final solution

TASK GOALS

- Develop and submit a draft and final report of the Classification and Compensation Study to Jefferson County.
- Present the final report to the County Council.

TASK ACTIVITIES

- 11.1 Produce a comprehensive draft report by January 15, 2017 that captures the results of each previous step. Provide the draft report to the CPM for review and approval. The final report will include the financial impact for the implementation of recommended changes to the compensation plan. It will also recommend a job evaluation plan that will allow the County to evaluate positions every two years.
- 11.2 Make edits and submit necessary copies of the final report to the CPM by March 1, 2017.
- 11.3 Present the final report to the County Council.
- 11.4 Develop a communication plan for sharing study results with employees of the County.
- 11.5 Provide administration manual with plan maintenance procedures.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Administration manual

Task 12.0
Develop
Recommendations
for Compensation
Administration

TASK GOAL

- Develop recommendations for continued administration by County staff to sustain the recommended compensation and classification system.

TASK ACTIVITIES

- 12.1 Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system, including recommendations and guidelines related to:



<p>Task 13.0 Provide Revised Class Descriptions and FLSA Determinations</p>	<ul style="list-style-type: none"> • 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; • 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. <p>12.2 Recommend recruitment/retention strategies, where appropriate.</p> <p>12.3 Present recommendations to the CPM for review.</p> <p>KEY PROJECT MILESTONES</p> <ul style="list-style-type: none"> • Recommendations for compensation administration • Recommendations for recruitment/retention policies <p>TASK GOALS</p> <ul style="list-style-type: none"> • Update existing class descriptions. • Create new class descriptions as needed. • Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) after approval by the CPM and Human Resources. <p>TASK ACTIVITIES</p> <p>13.1 Assess current class descriptions for form, content, validity, and ADA compliance.</p> <p>13.2 Discuss new class description format with the CPM.</p> <p>13.3 Revise classification descriptions based on data gathered from the JAT process.</p> <p>13.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.</p>
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	<p>13.5 Make FLSA determinations based on work performed and federal requirements.</p> <p>13.6 Recommend a systematic, regular process for reviewing job descriptions.</p>
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KEY PROJECT MILESTONES

- Updated class descriptions
- New class descriptions, as needed
- FLSA determinations

4.4 Proposed Timeline

Evergreen Solutions possesses the ability, staff, skills, and tools to conduct the Classification and Compensation Study and deliver a final report to Jefferson County on March 1, 2017. This is based on a tentative start date of November 9, 2016 which is recommended in the RFP. Evergreen understands that the draft final report is due no later than January 15, 2017.

This timeline can be modified in any way to best meet the needs of Jefferson County.



Chapter 5

References



Evergreen Solutions, LLC

5.0 References

As required in the Request for Proposal, we have provided you with four references that we feel demonstrate the breadth and quality of the work our team has performed 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.

**Classification and Compensation Study
St. Charles County, Missouri**

Contact Information: Ms. Ruth Rollins, Assistant Director of Human Resources, 201 N. Second Street – Suite 519, St. Charles, Missouri 63301, (636) 949-7320 x7192, rrollins@sccmo.org
Total Fee Paid: \$65,000



**Classification and Compensation Study
Sedgwick County, Kansas**

Contact Information: Ms. Bethany Corral, Compensation Manager, 510 N. Main, Suite 306, Wichita, Kansas 67203, (316) 660-9239, bcorral@sedgwick.gov
Total Fee Paid: \$116,000



**Employee Classification and Compensation Study
Blount County, Tennessee**

Contact Information: Ms. Jenny Morgan, Human Resources Director, 397 Court Street, 3rd Floor, Maryville, Tennessee 37804, (865) 273-5781, jmorgan@blounttn.org
Total Fee Paid: \$48,000



**Compensation Study
County of York, Virginia**

Contact Information: Mr. Dave Gorwitz, Human Resources Director, 120 Alexander Hamilton Building, Yorktown, Virginia 23690, (757) 890-3687
dgorwitz@yorkcounty.gov
Total Fee Paid: \$56,800



Chapter 6

Proposed Fees



Evergreen Solutions, LLC

6.0 Proposed Fees

Evergreen Solutions, LLC is pleased to present our proposed fees to conduct a Classification and Compensation Study for Jefferson County. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable fee. Evergreen Solutions 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 fee to complete all tasks identified in our detailed work plan in **Chapter 4** is included on the attached "Proposal Submission Form" from the RFP. Our fee 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 fee includes three separate trips to Hillsboro for purposes of completing the requested work.

The following is our preferred invoicing schedule:

- 25% - upon completion of Task 1 of our detailed work plan
- 25% - upon completion of Tasks 2 – 5 of our detailed work plan
- 25% - upon completion of Tasks 6 – 8 of our detailed work plan
- 25% - upon completion of Tasks 9 – 13 of our detailed work plan

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that Jefferson County wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.



Chapter 7

Subcontractors



Evergreen Solutions, LLC

7.0 Subcontractors

Evergreen Solutions will not be using any subcontractors for the Classification and Compensation Study. In-house staff only will be used.



Chapter 8

Sample Report



Evergreen Solutions, LLC

8.0 Sample Report

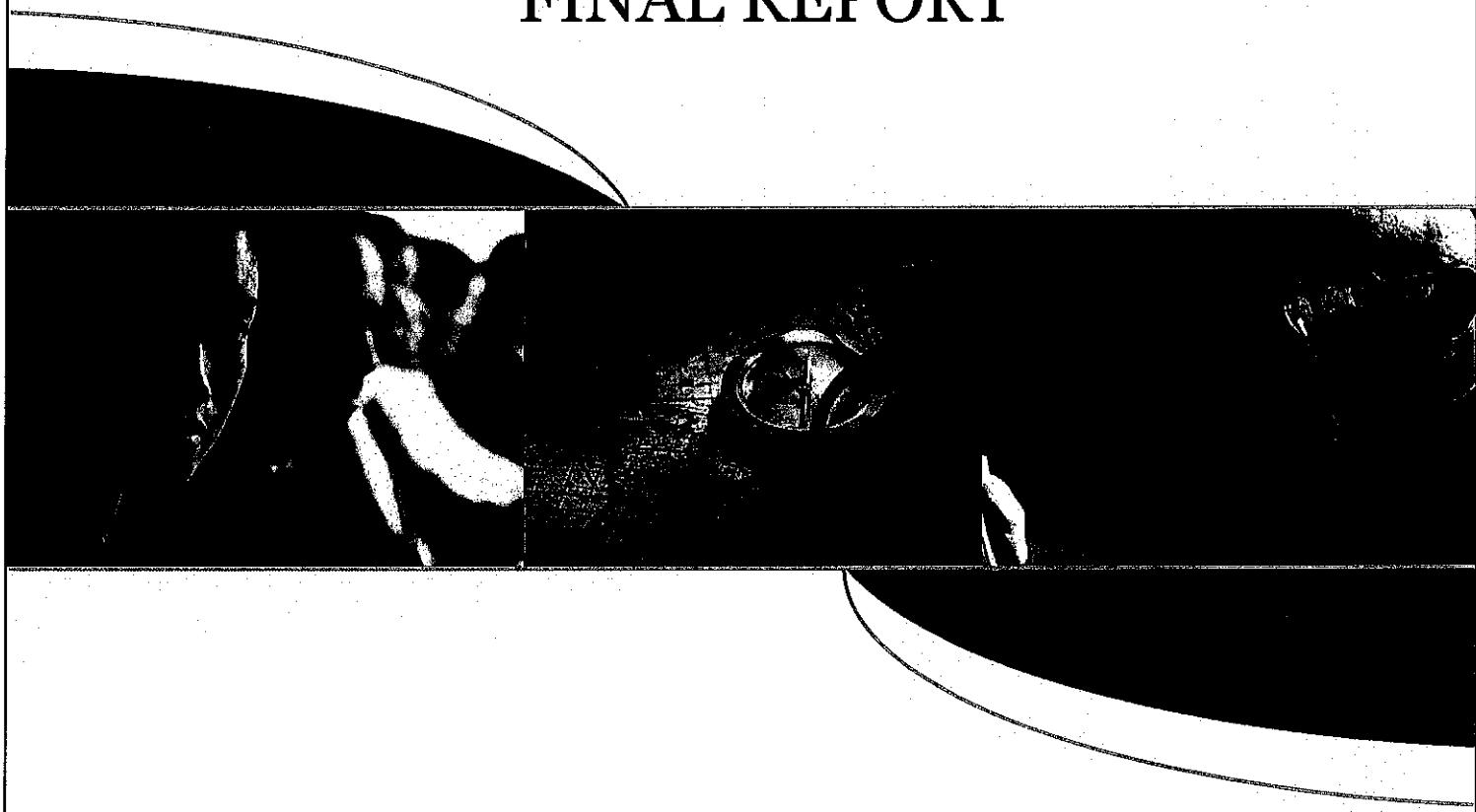
As required in the Request for Proposal, we have attached a sample report for a similar study we conducted for St. Charles County in Missouri. Before a final report is finalized and submitted to a client, we submit interim reports for review and approval using the same format.



Classification and Compensation Study

St. Charles County, MO

FINAL REPORT

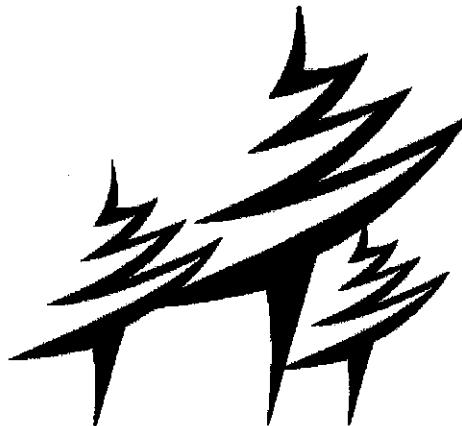


Evergreen Solutions, LLC

October 16, 2015

Classification and Compensation Study

St. Charles County, MO



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October 16, 2015

EVERGREEN SOLUTIONS, LLC

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Chapter 1 – Introduction

In April 2015, Evergreen Solutions was retained by St. Charles County to conduct a Classification and Compensation Study for approximately 1,020 full-time and 605 intermittent employees under approximately 358 job titles in the organization. A study of this nature is primarily designed to focus on internal and external equity of both the structure by which employees are compensated as well as the way positions relate and compare to one another across the organization.

Internal equity relates to the fairness of an organization's compensation practices among its current employees. Specifically, by reviewing the skills, capabilities, and duties of each position, it can be determined whether similar positions are being compensated in a similar manner within the organization. The classification component of this study is aimed at resolving any inconsistencies related to job requirements and providing some clarity to the plan in place. External equity deals with the differences between how an organization's classifications are valued and what compensation is available in the market place for the same skills, capabilities, and duties.

As part of the study, Evergreen Solutions, LLC was tasked with:

- collecting and reviewing current environmental data present at the County;
- reviewing job descriptions and obtaining job analysis questionnaires from employees;
- conducting a market survey and providing feedback to the County regarding current market competitiveness;
- conducting a classification analysis to assess internal equity and the efficiency of the current classification plan;
- developing strategic positioning recommendations using market data and best practices;
- reviewing the County's current classification and compensation plans;
- developing a compensation structure and implementation cost plan;
- providing a job evaluation plan for evaluation of positions every two years;
- providing an administration manual with plan maintenance procedures;



- providing a summary document that can be used to communicate the compensation system change to current and future employees; and
- developing and submitting draft and final reports summarizing findings and recommendations.

1.1 STUDY METHODOLOGY

Evergreen Solutions combines qualitative as well as quantitative data analysis to produce an equitable solution in order to maximize the fairness and competitiveness of an organization's compensation structure and practices. Project activities included:

- conducting a project kick-off meeting;
- conducting orientation sessions with employees;
- facilitating employee focus group sessions;
- conducting a market survey;
- developing recommendations for compensation management;
- developing detailed implementation plans; and
- creating draft and final reports.

Kickoff Meeting

The kickoff meeting provides an opportunity to discuss the history of the organization, finalize the work plan, and begin the data collection process. Data collection of relevant background material (including existing pay plans, organization charts, policies, procedures, training materials, job descriptions, and other pertinent material) is part of this process. The kick-off meeting was held on April 8, 2015.

Orientation Sessions

The orientation sessions are designed to brief employees and supervisors on the purpose and major processes of the study. This process is intended to address any questions and resolve any misconceptions about the study and relevant tasks. In total, five orientation sessions were held during this study. Two orientation sessions were held on April 28, 2015; two orientation sessions were held on April 29; and one was held on April 30, 2015.

Focus Groups and Interviews

Focus groups and interviews were completed from April 28-30, 2015. A total of 31 focus groups and interviews were completed with department directors and employees. These sessions are designed to gather feedback from employees and supervisors regarding their perceptions on compensation and classification within the County. Employees are also asked about their experience with the County. This information provides some basic perceptual background as well as a starting point for the research process.



Market Survey

The external market is defined as identified peers that have similar characteristics, demographics, and service offerings as the target organization and benchmark positions are identified from each area and level of the organization and typically include a large cross-section of positions. Once the target and benchmark information is finalized, a survey tool is created to solicit compensation information from each of the peer organizations. When the results are received, the data are analyzed, cleaned, and entered to provide aggregate findings. Specifics regarding the market survey for St. Charles County are contained in Chapter 4.0.

Solution Creation

Solution creation is the process of slotting employees into the proposed pay plan to determine how the County will transition to the proposed system and total implementation cost. Leading up to this phase, desired range spreads (distance from minimum to maximum) and midpoint progressions (distance from the midpoint of one pay grade to the next) are established. Once the structure is created, jobs and employees can be slotted into the proposed pay grade structure using market data and Client Project Manager (CPM) feedback. As part of the study, the organization identifies its desired market position. Subsequently, the pay plan and job slotting within the system can be adjusted to account for this desired position in the market.

The final step in the creation of the solution is to identify the costs associated with each step of the analysis. The data from the job slotting are applied to the individual incumbents in the organization. This allows the County to view the total costs associated with the structural changes. Information is then provided to the County on various ways to implement the proposed structure and possible adjustments that can be made to address any remaining issues.

1.2 REPORT ORGANIZATION

This report includes the following chapters:

- Chapter 2 – Summary of Employee Outreach
- Chapter 3 - Assessment of Current Conditions
- Chapter 4 – Market Summary
- Chapter 5 – Recommendations



Chapter 2 – Summary of Employee Outreach

Evergreen consultants visited the County between April 28 and April 30, 2015 to conduct outreach sessions. These sessions consisted of orientation presentations, interviews, and focus groups with County employees. The orientation segment of the outreach sessions gave employees and supervisors an opportunity to learn about the study process and about their role in the study. During the focus group segment, Evergreen consultants asked questions designed to gather feedback on several topics related to the study. This feedback provided the Evergreen Team with valuable knowledge of employee opinions on the County's current compensation and classification systems.

Five orientation sessions were held during the onsite visit. Orientation sessions generally lasted 40-50 minutes, and included a brief overview of the study and a detailed walk-through of the Job Assessment Tool (JAT) process—which all employees included in the study were asked to complete. Approximately 150 individuals attended Evergreen's orientation sessions, representing employees from all departments. A recording of one of the orientation sessions was provided in the JAT email sent to each employee for those employees that were not able to attend in-person.

Focus groups and interviews were also conducted as part of the onsite visit. A total of 31 focus groups and interviews were held, and included participation of supervisors, employees, and department directors. The objective of the focus groups and interviews was to collect feedback on strengths and weaknesses of the County's current compensation and classification plan directly from the employees. These sessions, like orientation sessions, lasted for approximately 40-50 minutes and resulted in rich feedback related to job title issues and compensation system methods employed by the County.

The comments made by focus group and interview participants are summarized in the remainder of this chapter. It is important to note that the views shared in this summary are not necessarily supported by Evergreen Solutions; however, they may have been used as a basis for further investigation throughout the course of the study. In all instances, information that may identify the commenter has been removed.

Comments and feedback have been organized into the following four sections:

- 2.1 General Feedback
- 2.2 Compensation
- 2.3 Classification
- 2.4 Summary



2.1 GENERAL FEEDBACK

Although the purpose of the focus group and interview sessions was to discuss compensation and classification, several questions asked by Evergreen consultants generally received feedback related to issues beyond this scope. In some cases, even questions related specifically to compensation and classification yielded feedback outside of these domains. Feedback received which is unrelated to compensation and classification is contained in this section, and while it may not be directly related to compensation and classification, it is important to give context to the environment in which this study is occurring.

Important factors frequently shared by employees as reasons for coming to work for and/or remaining with the County included:

- **Work Environment** – Across all focus groups, employees shared the sentiment that their co-workers are good people to work with, and that most employees share a true desire to support the community and enjoy working with (and for) members of the community.
- **Benefits** – Many employees shared that they have stayed with the County because of the quality of benefits offered to employees. High levels of coverage and minimal out-of-pocket expenses were cited as the primary qualities of the County's health insurance plan.
- **Stability/Flexibility** – Employees unanimously shared that they have stayed at the County because of the level of job security the County provides. Further, several employees noted that some County positions offer flexibility in terms of hours.
- **Retirement Plan** – Several employees noted that the retirement plan for the County is very generous, and a main reason for why they have stayed with the County. Some employees expressed a desire for continued benefits after retirement.

2.2 COMPENSATION

Specific comments shared by employees related to compensation practices, policies, and procedures at the County included the following:

- **Compression** – Although not confirmed by Evergreen, employees shared that they are aware of instances where more recent hires received a starting salary/hourly rate similar to, or above, that of employees who had been with the County for a longer period of time. They were frustrated with the situation and shared that policy should be created to eliminate this situation.
- **External Equity** – When employees were asked how they think the County's compensation compares to market compensation, the majority of employees shared that they think the County's pay is lower than what is offered in



neighboring cities and counties for comparable jobs. Employees noted that in Public Safety fields, the County is a “training ground” for other organizations.

- **Range Maximum** – Several employees shared that they are at the top of the pay range for their classification and can therefore no longer receive pay increases. These employees shared that they would like the County to explore models for rewarding their longevity.
- **Bi-Lingual Supplement/Pay** – One employee shared that the County should consider offering bi-lingual pay, as many residents that come in for critical services do not speak fluent English, and in those instances it is critical that bi-lingual employees are available.
- **Certifications, Licenses, and Continued Education** – Employees shared that neighboring organizations provide additional compensation for many licenses, certifications, and educational degrees that St. Charles County does not recognize monetarily. These employees shared that, in order for the County to remain truly competitive across all facets, this will need to be addressed during the course of this study.
- **Compensatory Time** – Focus group participants shared that they like that the County offers compensatory time; however, many noted there are inconsistencies in how it is used. Some employees shared that their compensatory time expires, or that accrual ceases altogether when the maximum is reached and not utilized. Some employees shared that they would like the option to receive overtime pay in lieu of compensatory time.

When employees were asked for feedback on issues related to specific job titles in the County, responses were related to positions for which the County is having a difficult time recruiting and retaining due to either being compensated below market or other unique issues related to compensation.

The following classifications were shared with Evergreen to be considered for market evaluation:

- Advanced HVAC Technician
- Animal Control Officer
- Animal Control Supervisor
- Construction Engineer
- Correctional Officer
- Dispatcher
- Field Appraiser
- Kennel Assistant
- Systems Engineer I, II, and III
- Systems Technician I, II, and III
- Truck Driver I and II



In addition to specific classifications, employees identified the following departments believed to be experiencing recruitment and retention issues as a result of compensation concerns:

- Corrections
- Community Health
- Information Systems
- Sheriff

2.3 CLASSIFICATION

General comments shared by employees related to classification included the following:

- **Career Path** – Several employees noted limited career paths at the County, many others shared that they feel there is little room for growth across departments and functional areas. These comments were primarily voiced by maintenance and technician employees in classifications that do not currently utilize leveling.
- **Certifications** – Many employees shared that they are expected to perform duties that have legally mandated certification requirements, though they do not possess the required certifications. In addition, many employees felt that the County does not adequately progress employees for obtaining these required certifications.
- **Supervisors** – Some employees shared that they are given supervisory responsibilities for other employees within their same classifications, but are not provided recognition or additional compensation for these responsibilities.
- **HVAC Technician** – Several employees shared that HVAC Technicians and Advanced HVAC Technicians perform the exact same work, regardless of certifications, but are classified differently. Employees in these classifications also suggested the use of a “Foreman” classification.
- **Juvenile Justice** – It was shared by several employees that the requirement of a Master’s degree limits mobility and provides little room for growth. Employees also mentioned that the classifications and job descriptions utilized across the various units are the same, though the actual work performed is considerably different.
- **Road and Bridge** – Some employees feel as though there is very little mobility for those in the Mechanic classifications. It was noted that employees in this classification appear to be performing different levels of work, thus leveling should be considered. Additionally, employees shared that the Highway Project Engineer is too general, as the incumbents in this classification perform considerably different work.



2.4 SUMMARY

Employee feedback reported above represents common issues that exist in many organizations. The feedback received by the Evergreen Team during outreach at the County was generally positive when considered as a whole. Employees believe that the County is a good place to work—attributed to the work environment and co-workers. However, it is apparent that employees perceive weaknesses in certain areas related to compensation and classification.

The Evergreen Team uses the information in this chapter as one component of the groundwork for this study. The comments and suggestions received during the outreach sessions are considered throughout the remainder of the study, including the development of the market survey described in Chapter 4 and the development of recommendations described in Chapter 5 of this report.



Chapter 3 – Assessment of Current Conditions

The purpose of this statistical evaluation is to provide an overall assessment of the structure of the compensation and classification plan in place within St. Charles County (the County), and a brief analysis of the employee demographics within the organization. Data included here reflect the plan at present and should be considered a snapshot in time. The data contained within this report provided the foundation for more detailed analysis and recommendations, but are not sufficient cause for recommendations in isolation. By reviewing information about the County's compensation structure, philosophies, and employee distribution, Evergreen Solutions gained a better understanding of the structures and methods in place which helped identify issues for both further review and potential revision.

3.1 PAY PLAN ANALYSIS

This section assesses the County's existing compensation structure. The assessment includes a review of general characteristics of the structure (e.g. type and number of grades), as well as assesses two common attributes of the structure, including:

- **Range Spread** –the percentage difference between the minimum and maximum of each pay grade; and
- **Midpoint Progression** – the percentage difference between the midpoint of one pay grade and next sequential pay grade.

Exhibit 3A illustrates the County's current pay schedules for all employees. The exhibit includes the pay grade number; the minimum, midpoint, and maximum salaries for each pay grade; range spread; and midpoint progression for each pay grade. Grades are numbered 1 through 19; however, the first four grades are not utilized by any full-time classifications. Though the schedule is numbered consecutively, the County maintains a banded pay schedule which establishes clear divisions between groups of grades. Grades one through seven are in Band A, grades eight through 13 are in Band B, and grades 14 through 19 are in Band C. As can be seen, the pay schedules have an open-range configuration.



EXHIBIT 3A
ST. CHARLES COUNTY
CURRENT PAY SCHEDULE

Band	Grade	Min	Mid	Max	Midpoint Progression	Range Spread
A	1	\$17,272.00	\$20,295.00	\$23,318.00	-	35.0%
	2	\$19,000.00	\$22,324.50	\$25,649.00	10.0%	35.0%
	3	\$20,900.00	\$24,557.00	\$28,214.00	10.0%	35.0%
	4	\$22,511.00	\$27,013.00	\$31,515.00	10.0%	40.0%
	5	\$24,762.00	\$29,714.00	\$34,666.00	10.0%	40.0%
	6	\$27,238.00	\$32,685.50	\$38,133.00	10.0%	40.0%
	7	\$29,962.00	\$35,954.00	\$41,946.00	10.0%	40.0%
B	8	\$33,019.00	\$40,448.00	\$47,877.00	12.5%	45.0%
	9	\$37,146.00	\$45,504.00	\$53,862.00	12.5%	45.0%
	10	\$41,790.00	\$51,192.50	\$60,595.00	12.5%	45.0%
	11	\$47,013.00	\$57,591.00	\$68,169.00	12.5%	45.0%
	12	\$52,890.00	\$64,790.00	\$76,690.00	12.5%	45.0%
	13	\$58,311.00	\$72,889.00	\$87,467.00	12.5%	50.0%
C	14	\$67,058.00	\$83,822.50	\$100,587.00	15.0%	50.0%
	15	\$77,116.00	\$96,395.50	\$115,675.00	15.0%	50.0%
	16	\$88,684.00	\$110,855.00	\$133,026.00	15.0%	50.0%
	17	\$101,986.00	\$127,483.00	\$152,980.00	15.0%	50.0%
	18	\$114,985.00	\$146,605.50	\$178,226.00	15.0%	55.0%
	19	\$132,232.00	\$168,596.00	\$204,960.00	15.0%	55.0%

Midpoint progression, or the difference between the midpoint of one grade and the next sequential grade, is an important measure in assessing a pay system's structure. A system with a high midpoint progression does not allow an organization the flexibility to place classifications close to market value; however, a midpoint progression that is too low can produce a system with too many pay grades. Pay grades in Band A of the County's system have a midpoint progression of 10.0 percent; pay grades in Band B have a midpoint progression of 12.5 percent; and pay grades in Band C have a midpoint progression of 15.0 percent. Generally, a midpoint progression of 3-5 percent is preferred; however, a greater midpoint progression is typically used in higher level grades as there are fewer classifications within these pay grades and thus less of a need for additional pay grades for slotting based on external and internal equity.

Range spread is defined as the percentage difference between pay grade minimum and pay grade maximum. These pay grade thresholds are generally aligned with market value, and best practice calls for a range spread of between 50 and 70 percent. The County's range spread increases in a step fashion, beginning at a low of 35.0 percent in grades one through three, and increasing to 40.0 percent for grades four through seven; 45.0 percent in grades 8 through 12; 50.0 percent for grades 13 through 17; and capping at a high of 55.0 percent for the last two pay grades. With that said, employees in classifications assigned to pay



grades possessing higher range spreads have greater opportunity for growth compared to employees in classifications assigned to pay grades with lower range spreads. However, progressively increasing range spreads is not unusual, and progressively larger range spreads are often seen as jobs become more complex.

Overall, the County's current compensation structure is presented well; however, there is room for improvement in terms of overall consistency and continuity among grades. It is important to have an organized compensation system for several reasons. First, it provides employees with an understanding of their earning potential. Secondly, it helps clear confusion about future salary increases or equity among different pay grades. From a planning prospective, an established pay structure also allows the organization to analyze and address problems regarding compression within job classifications and among different grades with a sense of consistency and thoroughness.

A competitive pay structure will allow the County to be an effective recruiter in the marketplace, contribute to a reduction in employee turnover, and give employees ample room for upward growth and professional development, all of which the present compensation plan has potential to do.

3.2 EMPLOYEE DEMOGRAPHICS

This section provides analyses on County employee demographics. The following analyses are intended to provide basic information regarding how employees are distributed among departments. As of April 2015, the County employed 1,024 individuals; all of which were included in this section of the study. The County has twenty plus Departments and 360 official classifications; however, only 304 of these official classifications are utilized.

Exhibit 3B depicts the number of classifications present in each department, along with the number and overall percentage of total employees by department. As the exhibit illustrates, the largest department is Police with 176 employees, representing 17.2 percent of the County's total workforce. The Construction Management and County Soil District departments are the smallest in the County, both with only one employee.



EXHIBIT 3B
COUNTY EMPLOYEES BY DEPARTMENT

Department	Class Titles	# of EEs	% of EEs
Airport	2	2	0.2%
Assessment	28	46	4.5%
Circuit Court	4	4	0.4%
Community Development	21	35	3.4%
Community Health	33	62	6.1%
Construction Management	1	1	0.1%
County Auditor	3	3	0.3%
County Collector	10	12	1.2%
County Council	2	2	0.2%
County Counselor	7	13	1.3%
County Executive	6	6	0.6%
County Parks and Recreation	23	47	4.6%
County Soil District	1	1	0.1%
Department Of Corrections	27	161	15.7%
Dispatch and Alarm	13	31	3.0%
Election Authority	8	15	1.5%
Facilities	25	48	4.7%
Family Arena	14	14	1.4%
Family Court	17	43	4.2%
Finance	13	18	1.8%
Highway	29	118	11.5%
Human Resources	5	7	0.7%
Information Systems	16	26	2.5%
Municipal Court	4	4	0.4%
Office Of Public Information	5	5	0.5%
Police	31	176	17.2%
Prosecuting Attorney	23	53	5.2%
Public Administrator	2	2	0.2%
Recorder Of Deeds	5	16	1.6%
Sheriff	15	41	4.0%
Transportation	2	2	0.2%
Workforce Development	6	10	1.0%

Exhibit 3C displays the classifications included in this study, as well as the number of employees per classification. The Police Officer and Correctional Peace Officer classifications have the greatest number of employees with 77 incumbents each.



EXHIBIT 3C
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Account Clerk II	5	6
Account Clerk III	12	7
Address Coordinator	1	7
Administrative Assistant - Associate	2	7
Administrative Assistant - Intermediate	15	8
Administrative Assistant - Senior	5	10
Advanced HVAC Technician	1	10
Advanced Maintenance Technician	2	9
Airport Manager	1	14
Animal Control Officer	5	8
Applications Analyst	1	12
Appraisal Manager	1	13
Archives Technician	1	8
Assistant Assessor-Real Estate	1	14
Assistant Auditor	1	13
Assistant County Collector	1	13
Assistant Court Clerk II	1	6
Assistant Director - Community Health	1	15
Assistant Director - Corrections	2	14



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Assistant Director - Corrections Medical Services	1	14
Assistant Director - Dispatch and Alarm	1	14
Assistant Director - Elections	1	13
Assistant Director - Facilities Maintenance	1	14
Assistant Director - Finance	1	15
Assistant Director - Human Resources	1	14
Assistant Director - Parks & Recreation	1	14
Assistant Director of Administration	2	17
Assistant District Supervisor	6	11
Assistant Health Services Coordinator	1	13
Assistant Market Research Coordinator	1	8
Assistant Prosecuting Attorney I	2	12
Assistant Prosecuting Attorney II	4	13
Assistant Prosecuting Attorney III	11	14
Assistant Prosecuting Attorney IV	3	15
Assistant Recorder of Deeds	1	13
Assistant Supervisor - Food Services	1	7
Associate County Counselor	7	15
Audio Visual Engineer	1	10
Bridge Foreman	1	10
Building Division Manager	1	13
Building Inspector I	1	9
Building Inspector II	4	10
Business Analyst	3	12
Business Applications Manager	1	14
Career Counselor	4	9
Carpenter I	1	7
Carpenter II	1	8
Carpenter III	1	10
Casa Coordinator	1	11
Chief Animal Control Officer	1	10
Chief Engineering Inspector	1	12
Chief Investigator	1	12
Chief Mechanic	4	10
Chief of Police	1	17
Chief Paralegal	2	11
Chief Park Ranger	1	12
Chief Plan Review Engineer	1	13
Chief Sign Technician	1	12
Child Support Legal Assistant	4	8
Circuit Clerk	1	15



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Clerical Supervisor I	2	8
Clerical Supervisor II	4	10
Collector of Revenue	1	-
Commercial Appraisal Analyst	1	11
Communication Systems Manager	1	15
Communications & Warning Officer	1	12
Community Health Nurse I	5	10
Community Health Nurse II	2	12
Computer Operations Coordinator	1	11
Computer Services Technician	1	8
Construction & Restoration Specialist	1	10
Construction Manager	1	15
Coordinator - Personal Property Assessment	1	8
Coordinator - Recycling Center	2	7
Corporal - Corrections	11	11
Correctional Officer	77	8
Correctional Peace Officer	19	10
Corrections Caseworker	2	9
Corrections Program Analyst	1	11
Corrections Program Coordinator	1	10
County Assessor	1	-
County Auditor	1	15
County Counselor	1	18
County Engineer	1	17
County Executive	1	-
County Planner II	2	11
County Planner III	1	12
County Public Administrator	1	13
County Registrar	1	13
County Sheriff	1	-
Court Security Aide	5	6
Crime Scene Investigator	7	9
Custodian	15	5
Deputy	1	12
Deputy - Bailiff	12	10
Deputy - Prisoner Transport/Relief Patrol	5	11
Deputy - Process Server	7	10
Deputy Public Administrator	1	7
Detective	20	12
Director - Administration	1	19
Director - Community Development	1	17



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Director - Community Health & Environment	1	17
Director - Corrections	1	16
Director - Dispatch & Alarm	1	15
Director - Facilities Maintenance	1	15
Director - Finance	1	17
Director - Human Resources	1	15
Director - Information Systems	1	17
Director - Parks & Recreation	1	15
Director - Transportation	1	15
Director - Workforce Development	1	15
Director of Elections	1	15
Dispatcher	28	9
District Supervisor	4	12
Division Dir - Bldg Code Enf & Construct Mgmt	1	15
Division Director - Development Review	1	15
Division Director - Environ Health & Protection	1	14
Division Director - Humane Services	1	14
Division Director - Neighborhood Pres	1	14
Division Director - Planning	1	14
DJO - Court Services	1	10
DJO - Court Services - Senior	19	11
DJO - Detention	5	9
Election Assistant	1	9
Electronics Technician	2	10
Emergency Management Officer	1	9
Emergency Management Planner	1	11
Engineering Analyst	1	10
Engineering Inspector II	5	10
Environmental Public Health Specialist	5	10
Equipment Mechanic	7	9
Erosion Control Inspector	2	10
Executive Assistant	3	10
Executive Assistant - Council at Large	1	11
Executive Assistant - County Executive	1	11
FA - Box Office Manager	1	10
FA - Concession/ Warehouse Manager	1	10
FA - Event/Conversion Manager	1	10
FA - Facilities Manager	1	13
FA - Finance Manager	1	12
FA - Food And Beverage Manager	1	13
FA - General Maintenance Technician	1	8



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
FA - General Manager	1	16
FA - Government Services Rep II	1	6
FA - HVAC Specialist	1	10
FA - Manager of Arena Services	1	12
FA - Manager Of Operations	1	13
FA - Marketing/ Group Sales Manager	1	10
FA - Suite/Club Manager	1	10
Family Court Coordinator	1	10
Family Court Legal Counsel I	1	12
Family Court Legal Counsel II	1	13
Field Appraiser	4	8
Field Auditor	1	7
Field Auditor/Investigator	1	9
Field/Property Maintenance Worker I	1	5
Field/Property Maintenance Worker II	1	6
Financial Services Administrator	1	9
First Assistant Prosecuting Attorney	1	15
Fiscal Manager	1	11
Fleet Coordinator	1	10
Food Service Worker	11	5
Forensic Lab Director	1	13
Forensic Scientist	1	10
General Maintenance Technician	5	8
GIS Analyst	2	11
GIS Services Manager	1	13
GIS Technician I	2	8
GIS Technician II	4	9
Government Services Representative I	25	5
Government Services Representative II	45	6
Government Services Representative III	4	7
Government Services Representative IV	3	8
Grant Administrator	1	11
Health Fiscal Supervisor	9	9
Heavy Equipment Operator	2	9
Highway Construction Engineer	6	13
Highway Construction Manager	1	14
Highway Project Manager	1	14
Highway Projects Engineer	2	13
Highway Superintendent	1	14
Highway Traffic Engineer	1	13
Horticulture Specialist	1	7



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Horticulture Supervisor	1	10
Human Resources Coordinator	2	8
Human Resources Generalist I	2	10
Human Resources Generalist II	1	12
HVAC Technician	3	9
Informational Systems Coordinator	1	9
Investigator	1	11
Juvenile Officer / Family Court Administrator	1	15
Kennel Assistant	6	5
Kennel Supervisor	1	8
Land Use Manager	1	13
Lead Agricultural Appraisal	1	10
Lead GIS Technician	1	10
Lead Housekeeper	2	6
Lead Housekeeper (Buffing)	1	6
Leadperson/Operator	12	10
Legal Secretary I	6	7
Legal Secretary II	3	8
Licensed Practical Nurse	2	9
Lieutenant	3	13
Litigation Assistant	4	11
Mail Services Specialist	2	5
Management Analyst III	1	13
Market Research Coordinator	1	10
Mosquito Control Program Coordinator	1	9
Municipal Court Administrator	1	13
Municipal Court Clerk	1	8
Municipal Judge	1	17
Natural Resources Specialist	2	7
Natural Resources Supervisor	1	10
Neighborhood Preservation Inspector	4	9
Network Engineer II	1	12
Nurse Practitioner II	1	14
Nursing Program Assistant	7	6
Nutritionist	2	10
Occupancy/Market Research Technician	2	7
Office Program Coordinator	1	10
Operations and Training Coordinator	1	12
Park Assistant Supervisor - YAP	1	8
Park Maintenance Worker II	11	6
Park Planner II	1	11



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Park Ranger	9	10
Park Supervisor	5	8
Park Supervisor - YAP	1	10
Parks Acquisition Coordinator	1	11
Parks Historian	1	11
Parks Marketing Coordinator	1	9
Parks Program Coordinator	1	9
Payroll Coordinator	1	9
Personal Property Administrator	1	9
Personal Property Manager	1	11
Plan Review Engineer II	3	11
Plan Review Engineer III	1	12
Police Captain	4	15
Police Lieutenant	7	14
Police Officer	77	12
Police Sergeant	13	13
Printer	1	8
Program Coordinator	2	11
Program Specialist I	9	7
Program Specialist II	5	8
Project Manager	1	14
Prosecuting Attorney	1	-
Psychologist	1	13
Public Affairs Coordinator	1	11
Public Health Educator	1	9
Public Health Information Officer	1	10
Purchasing Coordinator	2	9
Purchasing Manager	1	13
Recorder of Deeds	1	-
Regional Response Planner	1	13
Registered Nurse - Corrections	3	12
Revenue Technician	1	9
Review Appraiser	5	9
Right of Way Specialist	1	12
Risk Manager	1	14
Senior Career Counselor	1	10
Senior Forensic Scientist	2	11
Senior Park Ranger	1	11
Sergeant	6	12
Special Assessments Manager	1	11
Staff Auditor	1	11



EXHIBIT 3C (CONTINUED)
EMPLOYEES BY CLASSIFICATION

Classification Title	Number of EEs	Current Grade
Suicide Prevention Coordinator	1	13
Suicide Prevention Officer	12	9
Superintendent - Juvenile Justice Center	1	13
Superintendent of Parks	1	11
Supervisor - Building Services	1	10
Supervisor - Child Welfare	1	13
Supervisor - Court Services	2	13
Supervisor - Dispatch	9	10
Supervisor - Food Services	1	10
Supervisor - General Maintenance	1	11
Supervisor - HVAC	1	11
Supervisor - Intake	1	13
Supervisor - Residential Appraisal	1	10
System Engineer I	3	12
System Engineer II	1	13
System Engineering Manager	1	15
System Technician I	4	9
System Technician II	4	11
Teacher	1	9
Technical Services Manager	1	13
Title Processor	1	9
Training/Quality Assurance Officer	2	11
Truck Driver/Laborer I	14	6
Truck Driver/Laborer II	36	8
Veterinary Aide	1	6
Veterinary Technician	1	7
Victim Advocate	3	9
Victim Advocate Coordinator	1	11
Victim Assistance Counselor	2	10
Video Production Assistant	1	7
Video Production Coordinator	1	9
Video Production Manager	1	11
Voting Systems Supervisor-Partisan	2	11
Waste Water System Inspector	1	10
Web Services Technician	1	9
WIC/Nutrition Manager	1	12
Wireless Communications/Network Spec I	1	9
Wireless Communications/Network Spec II	1	10
Wireless Communications/Network Spec III	1	11
Youth Specialist	2	8



3.3 GRADE PLACEMENT ANALYSIS

In assessing the overall effectiveness of an organization's pay plan and policies, it is often helpful to analyze where employee salaries stand in comparison to the range in which their classifications are placed. An organization with no career ladder, which limits the methods by which employees are able to progress through the ranges, would be expected to reveal a large clustering of employees at or near the minimum of their pay grades. An organization with severely uncompetitive range values may have employees clustered near the top of their ranges because the organization is required to pay them the highest salary possible in order to limit turnover. These situations as well as others may reveal themselves through the analysis of grade placement data and for that reason it is analyzed in this segment of the report. The following classifications are excluded from this analysis as they are elected officials and have no established pay range: County Assessor, Collector of Revenue, County Executive, Director of Elections, Prosecuting Attorney, Recorder of Deeds, County Council members, and County Sheriff.

Exhibit 3D shows that across all employees in the County, 0.7 percent (7) of employees are compensated below their respective grade minimum, while 0.2 percent (2) of employees are compensated above their grade maximum. Compensating employees below their grade minimum can cause confusion for the affected employee and can lead to dissatisfaction. Conversely, compensating employees above their classification's grade maximum could be indicative of an outdated pay plan. The exhibit also shows that 76.0 percent of employees (773) are within their respective classifications range and are below midpoint. Contrarily, 23.1 percent of employees (235) are compensated above their grade midpoint. Generally, too many employees above or below midpoint can result in compression within a pay grade.

EXHIBIT 3D
COUNTY EMPLOYEES BELOW AND ABOVE MIDPOINT ANALYSIS

Grade	Total Emp.	Below Min		Below Mid		Above Mid		Above Max	
		#	%	#	%	#	%	#	%
5	60	1	2%	53	88%	6	10%	-	-
6	94	-	-	78	83.0%	16	17.0%	-	-
7	47	-	-	36	77%	11	23%	-	-
8	180	2	1.1%	157	87.2%	21	11.7%	-	-
9	123	1	1%	100	81%	21	17%	1	1%
10	145	-	-	91	62.8%	53	36.6%	1	0.7%
11	90	-	-	48	53%	42	47%	-	-
12	137	1	0.7%	116	84.7%	20	14.6%	-	-
13	59	-	-	41	69%	18	31%	-	-
14	38	1	2.6%	24	63.2%	13	34.2%	-	-
15	31	-	-	23	74%	8	26%	-	-
16	2	-	-	1	50.0%	1	50.0%	-	-
17	9	1	11%	5	56%	3	33%	-	-
18	1	-	-	-	-	1	100.0%	-	-
19	1	-	-	-	-	1	100%	-	-
	1017	7	0.7%	773	76.0%	235	23.1%	2	0.2%



3.4 QUARTILE ANALYSIS

To determine where employee salaries fall within the pay structure, each pay grade possessing at least one employee was divided into four equal quartiles, and employees were assigned a quartile based on where their actual salary fell. Employees earning a salary between 0 and 25 percent of their range spread were assigned to the first quartile; employees compensated between 25 and 50 percent of their range spread were assigned the second quartile; employees compensated between 50 and 75 percent of their range spread the third; and employees compensated beyond 75 percent of their range spread were placed in the fourth quartile.

Exhibit 3E illustrates the number of employees in each pay grade and in each quartile. Exhibit 3F also analyzes the number of employees in each pay grade and in each quartile, but presents the figures as a graph representing percentage of the total number of employees in each grade. Overall, 41.3 percent (420) of employees are compensated in the first quartile of their respective grades; 35.4 percent (360) are compensated in the second quartile of their respective grades; 16.8 percent (171) are compensated in the third quartile; and 6.5 percent (66) are compensated in the fourth quartile. This outcome is common because typically an employee placed further into their pay grade has a greater number of years of experience, and longer tenured employees are less common in an organization than those with shorter tenure.

EXHIBIT 3E
QUARTILE ANALYSIS (COUNT OF EMPLOYEES)

Grade	Total Emp.	Q1		Q2		Q3		Q4	
		#	%	#	%	#	%	#	%
5	60	41	68.3%	13	21.7%	1	1.7%	5	8.3%
6	94	43	45.7%	35	37.2%	8	8.5%	8	8.5%
7	47	14	29.8%	22	46.8%	7	14.9%	4	8.5%
8	180	98	54.4%	61	33.9%	10	5.6%	11	6.1%
9	123	63	51.2%	38	30.9%	18	14.6%	4	3.3%
10	145	46	31.7%	45	31.0%	37	25.5%	17	11.7%
11	90	21	23.3%	27	30.0%	34	37.8%	8	8.9%
12	137	67	48.9%	50	36.5%	16	11.7%	4	2.9%
13	59	15	25.4%	26	44.1%	17	28.8%	1	1.7%
14	38	3	7.9%	22	57.9%	11	28.9%	2	5.3%
15	31	8	25.8%	15	48.4%	6	19.4%	2	6.5%
16	2	-	-	1	50.0%	1	50.0%	-	-
17	9	1	11.1%	5	55.6%	3	33.3%	-	-
18	1	-	-	-	-	1	100.0%	-	-
19	1	-	-	-	-	1	100.0%	-	-
	1017	420	41.3%	360	35.4%	171	16.8%	66	6.5%



3.5 COMPRESSION ANALYSIS

Pay compression exists when inequities are present between the pay of various employees. Pay compression can occur when the pay of supervisors and their subordinates is too close, the pay of highly tenured staff and newly hired employees in the same job is too close, and/or the pay grade midpoints in sequential job grades is too close. According to the Society for Human Resources Management (SHRM)¹, specific examples of actions that may cause pay compression include the following:

- Reorganizations change peer relationships and can create compression if jobs are not reevaluated.
- In some organizations, certain departments or divisions may be relatively liberal with salary increases, market adjustments and promotions while others are not.
- Some employers have overlooked their HR policies designed to regulate pay, paying new hires more than incumbents for similar jobs under the mantra of “paying what it takes to get the best talent.”
- Many organizations have found it easy to hire people who had already done the same work for another organization, eliminating the need for training. Rather than hiring people with high potential and developing them for the long term, they have opted for people who could “hit the ground running—regardless of their potential.”

There are two well-known methods for assessing pay compression:

- First, an analysis of how supervisor salaries compare to their direct report salaries can reveal issues with compression.
- Second, an analysis of correlation between years of experience and pay grade range placement can reveal areas where employees are being compensated higher or lower than expected.

Exhibit 3G displays County employee's annual salaries as a percent of their supervisor's annual salaries by pay grade. According to SHRM, while there is no rule for when the salary-compression level becomes dangerously close, a good rule of thumb is to look at areas where direct report salaries are more than 95 percent of supervisor salaries. Further, areas where direct report salaries are 80 to 95 percent of supervisor salaries should be watched carefully for changes that could cause salaries to exceed 95 percent.

¹ Kochanski, J., & Stiles, Y. (2013). *Put a Lid on Salary Compression Before It Boils Over*. Retrieved from <http://www.shrm.org/hrdisciplines/compensation/articles/pages/salary-compression-lid.aspx>



EXHIBIT 3G
EMPLOYEE PAY AS A PERCENT OF SUPERVISOR PAY BY GRADE

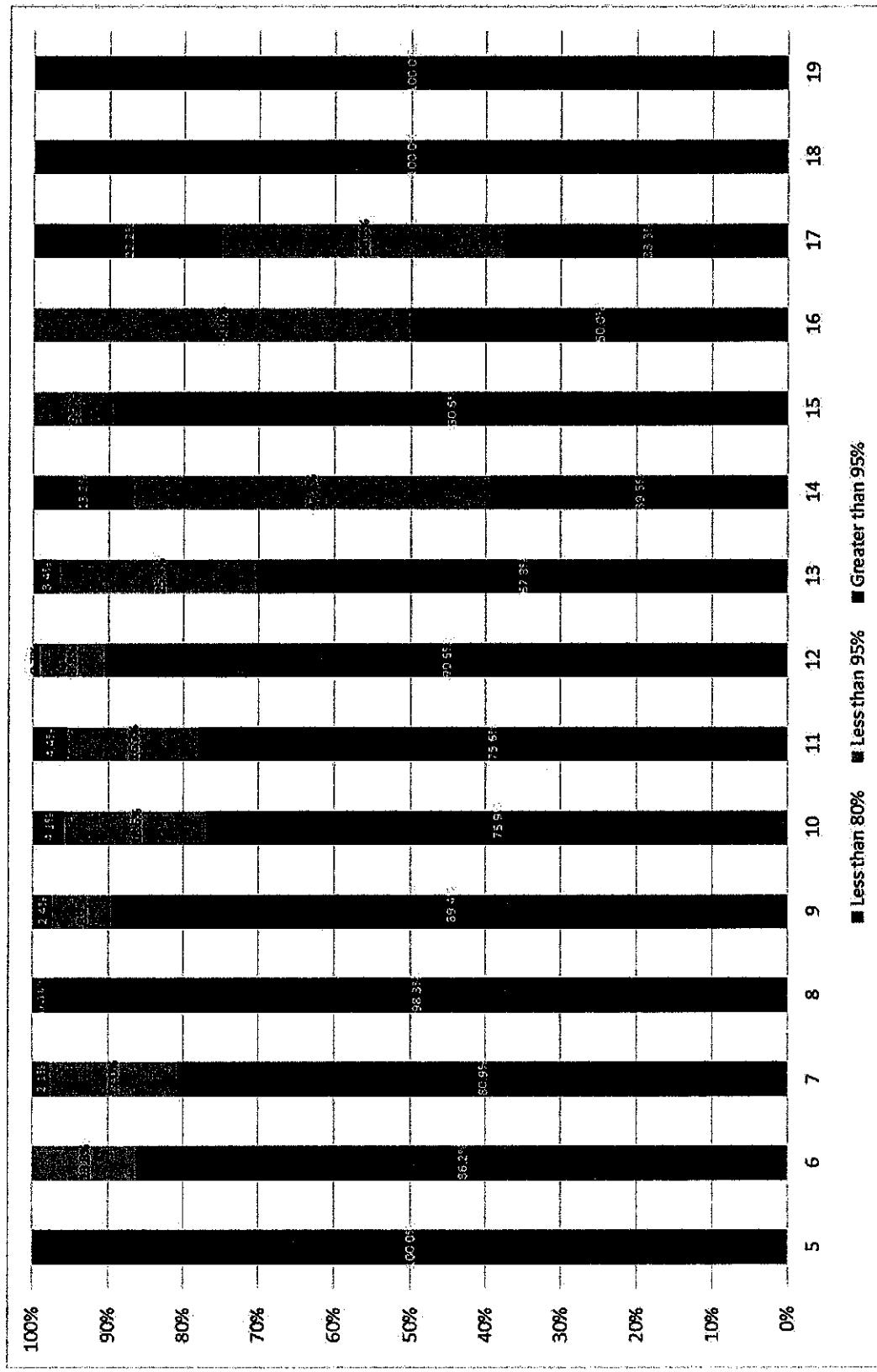


Exhibit 3I displays an analysis of variance between employee's actual salary placement and expected salary placement by pay grade. Expected placement is calculated by completing the following process for each employee:

- **Step 1: Calculate Expected Range Penetration % = Years of Experience in Current Job/30 years***
- **Step 2: Calculate Expected Salary Placement = (Expected Range Penetration % X (Max – Min)) + Min**

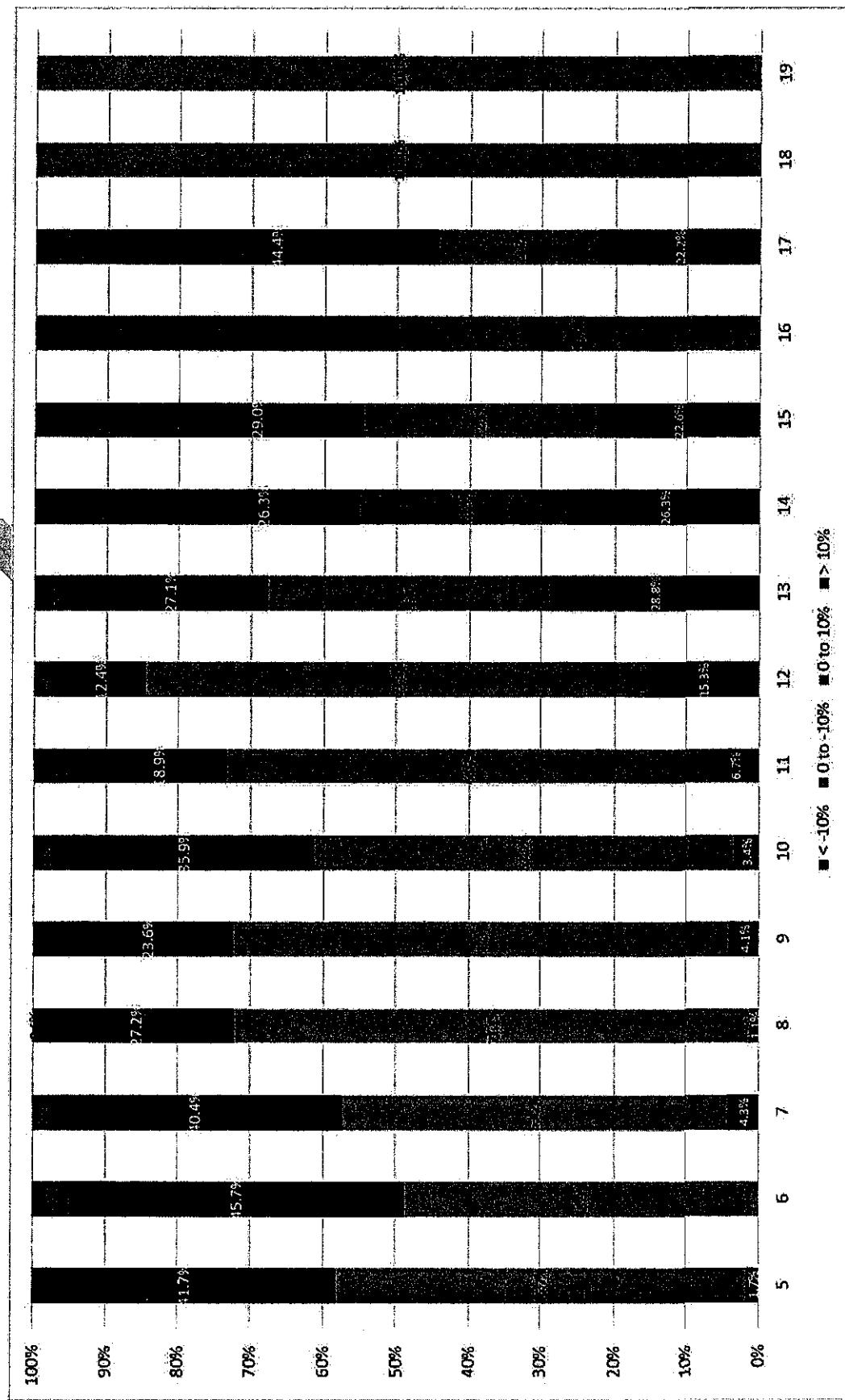
*Length of typical career; used for analysis sake only.

Once the expected salary placement is determined, it is compared to each employee's actual salary to determine the variance. For those employees where the variance is found to be negative (i.e. the employee's pay is below where the analysis indicates the salary should be placed), it is typically recommended that their salary be brought to the level of expected salary unless there is reason for current placement. For those employees with no variance, or positive variance, no action is typically needed.

Exhibit 3H displays, by pay grade, the percentage of employees whose actual salary varies from expected. Employees have been grouped into one of four categories for ease of analysis, including: those whose actual salaries are 10 percent or more above expected salary; those whose actual salaries are between 0 and 10 percent above expected salary; those whose actual salaries are between 0 and -10 percent below expected salary; and those whose actual salaries are -10 percent or greater below expected salary. As can be seen, across most grades a majority of employee salaries fall within +/-10% of expected salary. Grades 13, 14, 15, and 17 have a relatively high percentage of employees whose salaries fall greater than 10.0 percent behind their expected salary. Few pay grades, with the exception of pay grade 16, display employee salaries 10.0 percent or more above expected salary. Overall, using this approach, compression does not appear to be a significant issue.



EXHIBIT 3H
ACTUAL VERSUS EXPECTED SALARY VARIANCE
BY PAY GRADE



Chapter 4 – Market Summary

This chapter contains a market analysis in which County salary ranges are compared to select peer organizations for select benchmark titles. Market comparisons provide key information regarding an organization's competitive position. It is important to note that the comparison of County salary ranges to the market does not translate well at the individual employee level. This is because a market range simply provides the upper and lower limits, or thresholds, within which an employee's actual salary should be placed, and does not provide any information on specific placement. Employee salary placement is typically determined based on a multitude of variables, such as the incumbent's education level, prior experience, and even the individual's ability to negotiate, which are not a focus of this study.

The salary survey focused on the average salary ranges offered by the market for a select subset of classifications. This external equity analysis allowed for a comprehensive examination of the County's compensation structure. Market comparison analysis is best thought of as a snapshot of current conditions, as market conditions will generally change over time. Therefore, a market survey and analysis should be performed at regular intervals to help maintain market competitiveness.

Evergreen Solutions considered several factors when selecting peers for comparison, including population, budget, and geographic proximity. Evergreen solicited market data from 32 market peers, and received usable information and data from the following 15 peers:

- City of Ellisville
- City of Florissant
- City of Kansas City
- City of Maryland Heights
- City of O'Fallon
- City of St. Charles
- City of St. Louis
- City of St. Peters
- Columbia City
- Boone County
- Greene County
- Madison County, IL
- St. Louis County
- St. Charles Library System District
- State of Missouri

A total of 563 data points were collected for comparative purposes. All data collected were adjusted for cost of living using a national cost of living index factor, which allowed salary dollars from entities outside of the immediate area to more accurately be compared in terms of spending power relative to the St. Charles County area. In addition to public sector peers, Evergreen accessed the Economic Research Institute (ERI) database to obtain private sector salaries to be folded into the analysis.



A total of 89 benchmark job classifications were included in the market survey. Exhibit 4A provides a summary of the results of the salary survey. Note that salaries have been normalized to 2080 hours for comparison purposes. This data represents base salary only and is composed of the following information:

- The market average range minimum, midpoint, and maximum. The survey range minimum indicates the average minimum salary for each classification provided by peer organizations. Survey range midpoint provides the average midpoint of the peer respondents for each classification surveyed. Survey range maximum provides the average maximum of the survey participants for each classification surveyed.
- The percent differentials are shown for survey market range minimum, midpoint, and maximum. The differentials specify the variance between the County's current salary ranges and the market average shown in the exhibit. A positive differential indicates that the County is above market for that classification at the range minimum, midpoint, or maximum. A negative differential indicates that the County is below market for that classification. In the final row of the exhibit, the average percent differentials for the range minimum, midpoint and maximum are provided. This is derived by averaging each classification's percent differential.
- The survey average range spread, which provides the average range width for each classification surveyed, is the percentage difference between the average minimum and average maximum salaries of the respondents, relative to the minimum. The average range spread for all of the surveyed classifications is provided in the final row of the exhibit. As can be seen, the average range spread across all market data is 49.2 percent.
- The number of survey responses for each classification is provided in the final column, and the average number of responses across all classifications is provided in the final row. As can be seen, the average number of comparative data points per classification is 6.3. Note that peer organizations offering data self-selected what positions within their organization they believed were comparable to County positions.

The following subsections discuss the results of the salary survey, based on data provided in Exhibit 4A.



EXHIBIT 4A*
COMPARISON OF MARKET RESULTS

ID	Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg	# Resp.
		Average	% Diff	Average	% Diff	Average	% Diff		
1	Address Coordinator	\$ 41,771.42	-39.4%	\$ 50,087.78	-39.3%	\$ 58,404.14	-39.2%	40.9%	2
2	Advanced HVAC Technician	\$ 36,189.52	-13.4%	\$ 44,389.48	-13.3%	\$ 52,435.14	-13.5%	44.9%	11
3	Airport Manager	\$ 59,348.34	11.5%	\$ 74,033.95	11.7%	\$ 88,040.83	12.5%	48.3%	5
4	Animal Control Officer	\$ 33,339.35	-1.0%	\$ 40,005.98	-1.1%	\$ 46,672.61	-2.5%	40.1%	9
5	Applications Analyst	\$ 46,196.66	12.7%	\$ 56,863.46	12.2%	\$ 67,530.26	11.9%	46.6%	6
6	Assistant Auditor	\$ 43,002.12	-26.3%	\$ 55,842.00	-23.4%	\$ 68,153.88	-22.1%	59.7%	10
7	Assistant County Collector	\$ 48,730.02	16.4%	\$ 64,649.18	11.3%	\$ 73,418.83	16.1%	51.4%	5
8	Assistant County Engineer	\$ 67,078.48		\$ 85,187.73		\$ 102,944.44		54.2%	11
9	Assistant District Supervisor	\$ 48,828.96	-3.9%	\$ 58,536.76	-1.6%	\$ 68,244.56	-0.1%	39.7%	6
10	Assistant Market Research Coordinator	\$ 42,443.58	-28.5%	\$ 53,257.58	-31.7%	\$ 62,666.63	-30.9%	48.8%	4
11	Assistant Prosecuting Attorney	\$ 59,562.05	-12.6%	\$ 83,357.61	-28.7%	\$ 104,820.90	-36.7%	77.1%	7
12	Associate County Counselor	\$ 65,282.11	15.3%	\$ 88,277.08	8.4%	\$ 111,272.05	-3.8%	71.6%	7
13	Attorney	\$ 73,859.15		\$ 102,294.26		\$ 128,397.11		74.9%	7
14	Building Division Manager	\$ 50,349.52	-13.7%	\$ 62,625.27	-14.1%	\$ 76,429.76	-12.6%	53.1%	10
15	Business Analyst	\$ 47,970.40	9.3%	\$ 61,374.58	5.3%	\$ 74,389.99	3.0%	55.0%	7
16	Business Applications Manager	\$ 50,040.65	25.4%	\$ 63,394.47	24.4%	\$ 76,748.29	-23.7%	53.4%	3
17	Casa Coordinator	\$ 41,519.40	11.7%	\$ 49,750.47	13.6%	\$ 57,981.54	14.9%	40.1%	3
18	Chief Animal Control Officer	\$ 40,709.42	2.6%	\$ 48,499.85	5.3%	\$ 56,290.29	7.1%	38.5%	7
19	Chief Mechanic	\$ 41,915.51	-0.3%	\$ 50,283.92	1.8%	\$ 57,976.39	4.3%	38.3%	10
20	Construction & Restoration Specialist	\$ 41,256.35	1.3%	\$ 59,363.51	-16.0%	\$ 77,470.67	-27.9%	89.9%	4
21	Construction Manager	\$ 57,538.15	25.4%	\$ 71,673.43	25.6%	\$ 85,067.33	26.5%	47.5%	7
22	Coordinator - Recycling Center	\$ 31,983.45	-6.7%	\$ 38,692.35	-7.6%	\$ 45,401.25	-8.2%	42.2%	3
23	Correctional Officer	\$ 31,173.00	5.6%	\$ 37,702.87	6.8%	\$ 44,232.73	7.6%	41.9%	10
24	Correctional Peace Officer	\$ 34,402.08	-17.7%	\$ 42,482.51	-17.0%	\$ 50,562.94	-16.6%	47.0%	5
25	Corrections Program Coordinator	\$ 47,108.75	-12.7%	\$ 64,996.95	-27.0%	\$ 82,885.16	-36.8%	79.1%	4
26	Counselor	\$ 93,952.11	18.3%	\$ 115,749.02	21.0%	\$ 137,545.93	22.8%	46.3%	7
27	County Auditor	\$ 64,674.69	16.1%	\$ 77,761.44	19.3%	\$ 91,157.57	21.2%	42.4%	8
28	County Planner III	\$ 51,432.47	2.8%	\$ 66,167.05	-2.1%	\$ 80,397.29	-4.8%	57.4%	10
29	Custodian	\$ 26,181.42	-5.7%	\$ 30,892.96	-4.0%	\$ 35,283.11	-1.8%	34.9%	16
30	Deputy - Bailiff	\$ 33,814.05	19.1%	\$ 43,025.35	16.0%	\$ 52,236.66	13.8%	55.7%	11
31	Deputy - Prisoner Transport	\$ 36,667.80	22.0%	\$ 43,785.08	24.0%	\$ 50,902.37	25.3%	39.5%	5
32	Deputy - Process Server	\$ 32,886.24	21.3%	\$ 39,895.82	22.1%	\$ 46,905.39	22.6%	42.8%	3
33	Deputy Public Administrator	\$ 31,138.08	-3.9%	\$ 38,671.27	-7.6%	\$ 46,204.46	-10.2%	48.8%	5
34	Director - Community Health & Environment	\$ 81,275.38	20.3%	\$ 105,918.78	16.9%	\$ 130,562.17	14.7%	61.1%	5
35	Director - Corrections	\$ 58,506.51	34.0%	\$ 85,947.71	22.5%	\$ 113,388.91	14.8%	95.2%	4
36	Director - Facilities Maintenance	\$ 60,992.19	20.9%	\$ 76,845.56	20.3%	\$ 92,698.93	19.9%	52.8%	7
37	Director - Human Resources	\$ 70,395.80	8.7%	\$ 88,411.89	8.3%	\$ 106,394.25	8.0%	51.5%	13
38	Director - Transportation	\$ 62,008.11	19.6%	\$ 83,153.18	13.7%	\$ 103,219.94	10.8%	67.4%	6
39	Director - Workforce Development	\$ 72,193.27	6.4%	\$ 94,131.92	2.3%	\$ 116,070.58	-0.3%	60.4%	2
40	Dispatcher	\$ 36,729.09	-1.1%	\$ 47,426.28	-4.2%	\$ 57,589.04	-6.9%	57.7%	10
41	Division Dir - Bldg. Code Enf & Construc	\$ 78,350.56	-1.6%	\$ 96,281.43	0.1%	\$ 114,212.30	1.3%	45.5%	6
42	DJO - Detention	\$ 42,557.21	-14.6%	\$ 61,291.76	-34.7%	\$ 80,026.31	-48.6%	93.5%	3
43	Drug Chemist	\$ 63,153.62		\$ 81,420.70		\$ 95,397.53		51.1%	1
44	Engineering Analyst	\$ 45,462.84	-8.8%	\$ 56,041.01	-9.5%	\$ 66,209.12	-9.3%	45.3%	8
45	Executive Secretary	\$ 40,058.39	14.8%	\$ 51,198.45	11.1%	\$ 61,693.81	9.5%	54.8%	11

*The County received the list of responders to each classification comparison and was given the opportunity to verify the validity of all comparisons.



EXHIBIT 4A (CONTINUED)*
COMPARISON OF MARKET RESULTS

ID	Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg	# Resp.
		Average	% Diff	Average	% Diff	Average	% Diff		
46	FA - Facilities Manager	\$ 48,240.06	17.3%	\$ 64,373.78	11.7%	\$ 80,276.70	8.2%	67.1%	8
47	FA - Marketing/ Group Sales Manager	\$ 53,924.89	-29.0%	\$ 67,527.81	-31.9%	\$ 80,599.09	33.0%	50.0%	5
48	Forensic Lab Director	\$ 64,039.54	-9.8%	\$ 80,255.47	-10.1%	\$ 96,471.40	-10.3%	50.7%	3
49	GIS Analyst	\$ 49,738.93	-5.8%	\$ 59,232.88	-2.9%	\$ 68,632.32	-0.7%	37.9%	10
50	GIS Services Manager	\$ 52,406.44	10.1%	\$ 58,284.03	20.0%	\$ 64,161.62	26.6%	25.1%	6
51	GIS Technician I	\$ 35,103.51	-6.3%	\$ 42,743.46	-5.7%	\$ 50,383.41	-5.2%	44.1%	8
52	GIS Technician II	\$ 39,889.25	-7.4%	\$ 48,451.09	-6.5%	\$ 57,012.94	-5.8%	43.3%	6
53	Human Resources Generalist I	\$ 44,746.65	15.4%	\$ 58,436.50	9.8%	\$ 72,565.69	5.4%	63.2%	8
54	HVAC Technician	\$ 36,474.33	1.8%	\$ 44,277.27	2.7%	\$ 51,837.74	3.8%	42.3%	7
55	Juvenile Officer / Family Court Adminis	\$ 65,617.64	14.9%	\$ 82,029.63	14.9%	\$ 98,441.62	14.9%	50.4%	2
56	Kennel Assistant	\$ 25,389.69	-2.5%	\$ 32,582.10	-9.7%	\$ 39,774.52	-14.7%	56.7%	1
57	Land Use Manager	\$ 48,383.87	17.0%	\$ 61,562.27	15.5%	\$ 74,379.60	15.0%	53.7%	5
58	Lead Agricultural Appraisal	\$ 46,825.34	-12.1%	\$ 55,827.03	-9.1%	\$ 64,828.72	-7.0%	38.7%	3
59	Lead Housekeeper	\$ 27,769.73	-2.0%	\$ 33,049.19	-1.1%	\$ 38,264.65	-0.3%	37.9%	8
60	Lead Housekeeper (Buffing)	\$ 27,769.73	-2.0%	\$ 33,049.19	-1.1%	\$ 38,264.65	-0.3%	37.9%	8
61	Lead Operator / Mechanic	\$ 38,155.94	8.7%	\$ 45,407.51	11.3%	\$ 52,659.07	13.1%	38.4%	5
62	Legal Secretary II	\$ 37,944.13	-14.9%	\$ 46,913.08	-16.0%	\$ 54,981.82	-14.8%	45.1%	8
63	Licensed Practical Nurse	\$ 37,071.16	0.2%	\$ 45,824.84	-0.7%	\$ 53,920.19	-0.1%	45.7%	10
64	Lieutenant - Corrections	\$ 55,323.13	5.1%	\$ 63,021.96	13.5%	\$ 70,720.79	19.1%	27.5%	3
65	Neighborhood Preservation Inspector	\$ 38,563.29	-3.8%	\$ 47,075.49	-3.5%	\$ 55,587.68	-3.2%	43.9%	3
66	Parks Marketing Coordinator	\$ 45,795.29	-23.3%	\$ 58,541.44	-28.7%	\$ 70,464.77	-30.8%	53.7%	5
67	Police Lieutenant	\$ 64,988.90	3.1%	\$ 74,629.95	11.0%	\$ 84,271.01	16.2%	29.2%	8
68	Police Officer	\$ 44,026.54	16.8%	\$ 52,127.13	19.5%	\$ 60,227.72	21.5%	36.7%	8
69	Police Sergeant	\$ 55,817.32	4.3%	\$ 63,136.87	13.4%	\$ 70,456.42	19.4%	26.1%	10
70	Project Manager	\$ 61,159.96	8.8%	\$ 77,782.03	7.2%	\$ 94,404.09	6.1%	54.3%	4
71	Public Affairs Coordinator	\$ 49,539.30	-5.4%	\$ 58,965.57	-2.4%	\$ 68,391.84	-0.3%	37.9%	7
72	Regional Response Planner	\$ 47,825.02	18.0%	\$ 62,445.49	14.3%	\$ 74,298.58	15.1%	55.6%	3
73	Registered Nurse - Corrections	\$ 49,570.53	6.3%	\$ 60,317.74	6.9%	\$ 70,521.94	8.0%	42.3%	9
74	Review Appraiser	\$ 39,620.17	-6.7%	\$ 48,777.51	-7.2%	\$ 57,934.85	-7.6%	46.7%	6
75	Sergeant - Civil Process	\$ 50,080.48	5.3%	\$ 57,859.27	10.7%	\$ 65,638.05	14.4%	31.0%	3
76	Sergeant - Corrections	\$ 48,311.52	8.7%	\$ 57,103.61	11.9%	\$ 65,895.70	14.1%	36.1%	4
77	Sergeant - Court Services	\$ 48,651.37	8.0%	\$ 57,150.60	11.8%	\$ 65,649.83	14.4%	34.3%	2
78	System Architect	\$ 54,268.82		\$ 70,218.06		\$ 85,774.63		58.1%	8
79	System Engineer I	\$ 55,330.74	-4.6%	\$ 69,159.30	-6.7%	\$ 82,110.21	-7.1%	48.9%	6
80	System Engineer II	\$ 59,576.29	-2.2%	\$ 74,391.64	-2.1%	\$ 88,329.32	-1.0%	48.7%	6
81	System Engineering Manager	\$ 62,483.11	19.0%	\$ 78,240.92	18.8%	\$ 93,591.11	19.1%	50.2%	5
82	System Technician I	\$ 40,386.08	-8.7%	\$ 49,196.01	-8.1%	\$ 58,005.93	-7.7%	43.9%	10
83	System Technician II	\$ 46,481.24	1.1%	\$ 54,011.70	6.2%	\$ 61,542.16	9.7%	32.1%	9
84	Technical Services Manager	\$ 64,785.79	-11.1%	\$ 78,161.53	-7.2%	\$ 91,537.28	-4.7%	41.6%	9
85	Truck Driver/Laborer I	\$ 30,356.03	-11.4%	\$ 35,126.27	-7.5%	\$ 38,789.69	-1.7%	28.0%	5
86	Web Services Technician	\$ 46,442.51	-25.0%	\$ 60,585.89	-33.1%	\$ 74,313.72	-38.0%	60.1%	3
87	Wireless Communications/Network Sp	\$ 41,789.69	-12.5%	\$ 53,842.69	-18.3%	\$ 64,360.63	-19.5%	53.9%	4
88	Wireless Communications/Network Sp	\$ 46,567.10	-11.4%	\$ 59,951.67	-17.1%	\$ 71,801.19	-18.5%	54.1%	4
89	Wireless Communications/Network Sp	\$ 53,633.78	-14.1%	\$ 66,824.04	-16.0%	\$ 78,479.23	-15.1%	46.8%	4
			3.0%		1.9%		1.6%	49.2%	6.33

*The County received the list of responders to each classification comparison and was given the opportunity to verify the validity of all comparisons.



4.1 MARKET MINIMUMS

A starting point of the analysis is to compare the peer average market minimum for each classification to County range minimums. Market minimums are generally considered as a starting wage for employees who meet the minimum qualifications for the classification. Those employees with salaries at or near the range minimums are generally new to the role and have not acquired the skills and experience necessary to be fully proficient in their classification. For County classifications without established range spreads, discussed in Chapter 3 of this report, while market data was collected for these positions range differentials could not be provided.

Based on the data gathered in the salary survey for the benchmarked positions, the following conclusions can be reached regarding range minimums (note that this is raw data representing external market equity comparisons only):

- The surveyed position differences ranged from a low of 39.4 percent below market to a high of 34.0 percent above market.
- Of the 89 classifications for which market minimum data were collected, 36 reported to be below market, which represents 40.4 percent of all benchmarks.
- 49 classifications (55.0 percent of surveyed classifications) indicated market differentials at the pay range minimum that were above market.
- A total of five classifications (5.6 percent of all surveyed classifications) indicated market differentials at the pay range minimum that were greater than 15.0 percent below market.

4.2 MARKET MIDPOINTS

This section explores the comparison between the average peer midpoints and County classification midpoints. Midpoint is frequently considered the point where employees who have achieved full proficiency in their job duties could expect their salaries to be placed. It is considered the best point of comparison for analyzing variances between an organization and their market peers.

Based on the data gathered at the market midpoint of the salary range, the following can be determined (note that this is raw data representing external market equity comparisons only):

- 36 classifications (40.4 percent) were below market at the market midpoint.
- 49 classifications (55.1 percent) were above market at the market midpoint.
- Of the positions below market, 11 classifications (12.4 percent) were greater than 15.0 percent below market.



4.3 MARKET MAXIMUMS

In this section, salary range maximum values are compared to the survey respondents' average maximums. Market maximums are often utilized to attract highly qualified employees or retain experienced individuals in a classification.

When comparing peer market pay grade maximums and County maximums, the following can be determined (note that this is raw data representing external market equity comparisons only):

- 38 classifications (42.7 percent) were below market at the market maximum.
- 47 classifications (52.8 percent) were above market at the market maximum.
- Of the positions below market, 12 classifications (13.5 percent) were greater than 15.0 percent below market.

4.4 CONCLUSION

In conclusion, the County's pay plan is very competitive with the market. Competitiveness only slightly diminishes moving from minimum to maximum of the salary range; however, even at range maximum, classifications were found to be 1.6 percent ahead of market. The diminishing competitiveness results from the County's more narrow range spread of 44.7 percent, as the market average range spread is 49.2 percent. Despite the County offering higher minimum salaries the market essentially catches-up with County ranges as they progress toward maximum.

Evergreen also assessed average market range spread for each band, based on the classifications contained within each. Exhibit 4B displays the average range spread of benchmarks based on their respective pay bands (A through C). As can be seen, the County range spread is behind market for all pay bands. In Chapter 4 of this report, Evergreen addresses this slight inequity between the County's pay structure and the market average range spread for each band.

EXHIBIT 4B COMPARISON OF RANGE SPREADS BY PAY BAND

	Band A	Band B	Band C
Peer Average	40.9%	48.1%	57.1%
County Average	37.9%	45.8%	51.7%

Overall, based on market comparisons alone, minor adjustments should be made to the range spread for each band to ensure market competitiveness. In addition, pay grade assignments for individual classifications should be adjusted. This analysis, coupled with the analysis in Chapter 3 of this report and an internal equity review provided the necessary data for the adjustments suggested in the following chapter.



Chapter 5 – Recommendations

The recommendations in this chapter seek to build on the strengths of St. Charles County's compensation and classification plan and also to address the challenges observed through the course of the study. Internal factors such as the future direction of the County, the organizational culture, and availability of resources influenced these recommendations. Each has also been developed to address a specific need based on the collected information while taking into account the external environment. Arriving at the overall solution for the County was a detailed process involving all components of the research conducted which was reviewed and discussed in previous chapters of this report.

Analysis of the County's compensation and classification system revealed a number of commendable practices and opportunities for improvement that are common in the public sector. The Evergreen team found the system to be uniform, comprehensive, transparent, and well stratified based on work performed. The recommendations presented in this chapter seek to build on the strengths of the current system while addressing the areas of opportunity discovered over the course of the study. Evergreen is proposing changes to the County's salary structure that uses the existing plan as a foundation while improving internal equity and market competitiveness. Each classification was reviewed relative to market equity data and internal equity relationships. Using this methodology, Evergreen developed a solution that improves the County's competitive position relative to its market peers while seeking to preserve internal equity.

A classification analysis is designed to identify and rectify issues of internal equity as well as help the organization reflect on recent task and responsibility changes. The combination of competition from local communities as well as the private sector causes even more importance to be placed on the quality and responsiveness of the classification system. Classification illustrates how work is organized as well as how the human resources are utilized to meet the needs and perform the core services of any organization. It is critical an organization possess a system that realistically captures what work is being performed by their employees.

FINDING

A documented compensation philosophy spells out an organization's position on how competitive their compensation will be with the market; the mix of benefits and base salary to be offered; the type of compensation system to be implemented (step, open range, hybrid, etc.); and the reward strategy the organization wishes to use (performance based, longevity, COLA, etc.). A well developed, consistently followed, transparent, communicated philosophy makes sense to employees; results in a sense of fairness; acts as a strong recruiting tool; encourages retention; and represents career and salary growth potential.



The County has not adopted a guiding Compensation Philosophy outlining the way in which employees will be compensated. Over the course of the study, Evergreen worked to develop a proposed Compensation Philosophy by soliciting input from County leaders, as well as using feedback from employee focus groups. The County should officially adopt the Compensation Philosophy developed over the course of this study.

RECOMMENDATION 1: Adopt the Compensation Philosophy displayed in Exhibit 5A.

The Compensation Philosophy should be adopted officially by the County in order to provide employees and stakeholders with a clear explanation on how the organization compensates its employees. Overtime, the County can expand this Compensation Philosophy as desired to accommodate changes in its compensation philosophy.

FINDING

The County's current salary schedule, which includes the County's pay bands, grades and values, possesses both strengths and weaknesses. Strengths include that the schedule is open range, as over the last ten years, municipalities and many other public sector organizations have moved away from the step pay plan style to an open-range type schedule such as the County's in order to increase flexibility in administration.

Identified weaknesses of the County's salary schedule include the following:

- **Midpoint Progression** – midpoint progression is inconsistent and high across all pay bands and grades, at 10.0 percent for Band A (pay grades 1 through 7); 12.5 percent for Band B (pay grades 8 through 13); and 15.0 percent for Band C (pay grades 14 through 19). Generally, a midpoint progression of 3-5 percent is preferred; however, a greater midpoint progression is typically used in higher level grades as there are fewer classifications within these pay grades and thus less of a need for additional pay grades for slotting based on external and internal equity. With such a high midpoint progression, it is difficult to place classifications near or at true market value. For example, if a classification's market midpoint falls exactly halfway between the midpoints of two pay grades in Band C, the classification would have to be slotted either up to the next highest pay grade, or down to the lower pay grade. Either way, the variance between placement and actual market value would be about 7.5 percent. With a smaller midpoint progression, classifications can be placed within 1.5 to 2.5 percent of actual market value.
- **Range Spread** – Range spread ranges from a low of 35 percent to a high of 55 percent. Best practice calls for a range spread of between 50 and 70 percent and the peer average range spread in the St. Charles County area calls for a range spread of between 40.9 and 57.1 percent. A narrower than market range spread can lead to higher employee turnover toward the top of the pay range, as employees leave for peers that offer a higher pay grade maximum.



EXHIBIT 5A
ST. CHARLES COUNTY, MO
TOTAL COMPENSATION PHILOSOPHY

St. Charles County is committed to providing an equitable, consistent, and competitive total compensation system of salary and benefits for employees that supports its' mission and vision. The County seeks to attract and retain a highly engaged, qualified and diverse workforce through a competitive total compensation system that fosters the County's goal of being an employer of choice. By rewarding and recognizing employees' experience, accomplishments, and performance in their classification to a level that is in-line with its' peers while maintaining fiscal responsibility to the citizens and working within constraints of available revenues, the County will be poised to continue to accomplish its mission. This philosophy serves as the foundation for the County's total compensation pay system and associated practices.

To support this philosophy, the County will:

- provide a total compensation system of salary and benefits that competes with the County's recognized peers in the applicable market and region for qualified employees;
- maintain salary levels that are competitive in the marketplace;
- develop and implement a compensation plan and classification structure that is internally and externally equitable, with potential for career and salary growth, and allows for flexibility in administration;
- design and administer an open range pay plan that provides for career and salary growth;
- communicate the compensation plan and classification structure to be transparent to and understood by employees and citizens;
- maintain the compensation and classification structure and associated policies and practices through regular internal review, and surveys of external peer market trends;
- administer the compensation and classification structure in a consistent, transparent, equitable manner; and
- develop, implement and maintain flexible hiring, promotion, and retention pay practices supporting the compensation and classification system that provide flexibility in offering competitive salaries to attract and retain a high-performing qualified workforce.

Addressing these weaknesses will act to improve the County's existing salary schedule.

RECOMMENDATION 2: Adopt the proposed salary schedule displayed in Exhibit 5B, which addresses the weaknesses identified by Evergreen.



EXHIBIT 5B
ST. CHARLES COUNTY
PROPOSED SALARY SCHEDULE

Grade	Min	Mid	Max	Progression	Range Spread
101	\$17,272.00	\$20,804.12	\$24,336.25	-	40.9%
102	\$18,135.60	\$21,844.33	\$25,553.06	5.0%	40.9%
103	\$19,042.38	\$22,936.55	\$26,830.71	5.0%	40.9%
104	\$19,994.50	\$24,083.37	\$28,172.25	5.0%	40.9%
105	\$20,994.22	\$25,287.54	\$29,580.86	5.0%	40.9%
106	\$22,043.94	\$26,551.92	\$31,059.90	5.0%	40.9%
107	\$23,146.13	\$27,879.52	\$32,612.90	5.0%	40.9%
108	\$24,761.62	\$29,502.58	\$34,243.54	5.0%	38.3%
109	\$25,518.61	\$30,737.17	\$35,955.72	4.2%	40.9%
110	\$26,794.54	\$32,274.02	\$37,753.51	5.0%	40.9%
111	\$28,134.27	\$33,887.73	\$39,641.18	5.0%	40.9%
112	\$29,540.98	\$35,582.11	\$41,623.24	5.0%	40.9%
113	\$31,018.03	\$37,361.22	\$43,704.40	5.0%	40.9%
114	\$32,568.93	\$39,229.28	\$45,889.63	5.0%	40.9%
202	\$33,147.58	\$41,119.58	\$49,091.57	-	48.1%
203	\$35,633.65	\$44,203.55	\$52,773.44	7.5%	48.1%
204	\$38,306.18	\$47,518.81	\$56,731.45	7.5%	48.1%
205	\$41,179.14	\$51,082.72	\$60,986.31	7.5%	48.1%
206	\$44,267.58	\$54,913.93	\$65,560.28	7.5%	48.1%
207	\$47,587.64	\$59,032.47	\$70,477.30	7.5%	48.1%
208	\$51,156.72	\$63,459.91	\$75,763.10	7.5%	48.1%
209	\$54,993.47	\$68,219.40	\$81,445.33	7.5%	48.1%
210	\$58,668.68	\$73,335.86	\$88,003.03	7.5%	50.0%
301	\$62,753.36	\$80,669.44	\$98,585.53	-	57.1%
302	\$69,028.69	\$88,736.39	\$108,444.08	10.0%	57.1%
303	\$75,931.56	\$97,610.02	\$119,288.49	10.0%	57.1%
304	\$83,524.72	\$107,371.03	\$131,217.33	10.0%	57.1%
305	\$91,877.19	\$118,108.13	\$144,339.07	10.0%	57.1%
306	\$101,064.91	\$129,918.94	\$158,772.97	10.0%	57.1%
307	\$116,224.65	\$149,406.78	\$182,588.92	15.0%	57.1%
308	\$133,658.34	\$171,817.80	\$209,977.26	15.0%	57.1%



The proposed salary schedule displayed in Exhibit 5B:

- is laid out in a similar format as the current salary schedule, maintaining employee familiarity with the system;
- provides an appropriate number of pay grades per band to allow for placement of classifications at a value that is both internally and externally equitable; and
- aligns range spread with market average range spread for each position group.

The proposed salary schedule conforms to best practice, aligns with market peer structures, and uses the existing County salary schedule as its framework to maintain some resemblance to the existing salary schedule. Pay grades are relabeled simply to reduce confusion in transitioning to the proposed system.

FINDING

In order to determine appropriate placement of all classifications onto the proposed salary schedule (Exhibit 5B) Evergreen conducted a two-part analysis. This process included an external equity analysis of market compensation data collected using a salary survey instrument, and an internal equity analysis of each of the County's classifications using the Job Assessment Tool (JAT) which was completed by employees, reviewed by supervisors, and then reviewed by Evergreen to ensure accuracy. The JAT is designed to gather specific information pertaining to each classifications role in the County, and ultimately produced an internal score for each County classification based on five job factors. Evergreen used both market data and JAT data to calculate expected placement using a regression model. The regression model looked at average market value for benchmarked positions and its corresponding JAT scores to calculate an expected market value for all positions – even those without market data. Overall, 83.3 percent of County employees completed their JAT and, of those completed, 75.4 percent were reviewed by a supervisor.

The external market compensation analysis identified County classifications compensated below market average, while the internal equity analysis identified County classifications compensated disproportionately to other County classifications based on complexity of the job performed; where classifications with a like internal worth would be expected to be compensated similarly. The results from these analyses were combined using regression analysis to determine appropriate placement into the proposed salary schedule. Proposed placement ensures that County classifications are being compensated competitively in comparison to the market, and that internally County classifications are being equitably compensated based on similar levels of job complexity and responsibility.

Based on this two-fold analysis, Evergreen identified appropriate placement for each County classification into the proposed salary schedule.



RECOMMENDATION 3: Adopt the proposed grade order list displayed in Exhibit 5C, which ensures both internal and external equity. This proposed grade order list slots classifications into the proposed salary schedule displayed in Exhibit 5B.

Exhibit 5C displays the current title and current pay grade for all County classifications, as well as the proposed title pay grade for each classification.

EXHIBIT 5C
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Account Clerk II	6	Account Clerk II	113
Account Clerk III	7	Account Clerk III	202
Address Coordinator	7	Address Coordinator	202
Administrative Assistant - Associate	7	Administrative Assistant - Associate	114
Administrative Assistant - Intermediate	8	Administrative Assistant - Intermediate	203
Administrative Assistant - Senior	10	Administrative Assistant - Senior	205
Advanced HVAC Technician	10	Advanced HVAC Technician	206
Advanced Maintenance Technician	9	Advanced Maintenance Technician	204
Airport Manager	14	Airport Manager	301
Kennel Assistant	5	Animal Care Attendant	110
Animal Control Officer	8	Animal Control Officer	202
Applications Analyst	12	Applications Analyst	210
Appraisal Manager	13	Appraisal Manager	210
Archives Technician	8	Archives Technician	202
Assistant Assessor-Real Estate	14	Assistant Assessor-Real Estate	301
Assistant Auditor	13	Assistant Auditor	210
Assistant County Collector	13	Assistant County Collector	210
Assistant County Engineer	13	Assistant County Engineer	210
Assistant Court Clerk-II	6	Assistant Court Clerk II	113
Assistant Director - Community Health	15	Assistant Director - Community Health	303
Assistant Director - Corrections	14	Assistant Director - Corrections	302
Assistant Director - Corrections Medical Services	14	Assistant Director - Corrections Medical Services	302
Assistant Director - Dispatch and Alarm	14	Assistant Director - Dispatch and Alarm	301
Assistant Director - Elections	13	Assistant Director - Elections	210
Assistant Director - Facilities Maintenance	14	Assistant Director - Facilities Maintenance	301
Assistant Director - Finance	15	Assistant Director - Finance	303
Assistant Director - Human Resources	14	Assistant Director - Human Resources	302
Assistant Director - Parks & Recreation	14	Assistant Director - Parks & Recreation	302
Assistant Director of Administration	17	Assistant Director of Administration	306
Assistant Director of Development Services	13	Assistant Director of Development Services	210
Assistant District Supervisor	11	Assistant District Supervisor	207
Assistant Health Services Coordinator	13	Assistant Health Services Coordinator	210
Assistant Market Research Coordinator	8	Assistant Market Research Coordinator	202
Assistant Prosecuting Attorney I	12	Assistant Prosecuting Attorney I	209
Assistant Prosecuting Attorney II	13	Assistant Prosecuting Attorney II	210
Assistant Prosecuting Attorney III	14	Assistant Prosecuting Attorney III	301
Assistant Prosecuting Attorney IV	15	Assistant Prosecuting Attorney IV	303
Assistant Recorder of Deeds	13	Assistant Recorder of Deeds	210
Assistant Supervisor - Food Services	7	Assistant Supervisor - Food Services	114
Associate County Counselor	15	Associate County Counselor	303
Audio Visual Engineer	10	Audio Visual Engineer	205
Bridge Foreman	10	Bridge Foreman	206



EXHIBIT 5C (CONTINUED)
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Building Division Manager	13	Building Division Manager	210
Building Inspector I	9	Building Inspector I	204
Building Inspector II	10	Building Inspector II	205
Business Analyst	12	Business Analyst	208
Business Applications Manager	14	Business Applications Manager	301
Career Counselor	9	Career Counselor	204
Carpenter I	7	Carpenter I	114
Carpenter II	8	Carpenter II	202
Carpenter III	10	Carpenter III	205
Casa Coordinator	11	Casa Coordinator	205
Chief Animal Control Officer	10	Chief Animal Control Officer	205
Chief Engineering Inspector	12	Chief Engineering Inspector	209
Chief Investigator	12	Chief Investigator	209
Chief Mechanic	10	Chief Mechanic	205
Chief of Police	17	Chief of Police	306
Chief Paralegal	11	Chief Paralegal	207
Chief Park Ranger	12	Chief Park Ranger	209
Chief Sign Technician	12	Chief Sign Technician	208
Child Support Legal Assistant	8	Child Support Legal Assistant	203
Circuit Clerk	15	Circuit Clerk	303
Clerical Supervisor I	8	Clerical Supervisor I	203
Clerical Supervisor II	10	Clerical Supervisor II	205
Collector of Revenue		Collector of Revenue	
Commercial Appraisal Analyst	11	Commercial Appraisal Analyst	207
Communication Systems Manager	15	Communication Systems Manager	303
Communications & Warning Officer	12	Communications & Warning Officer	208
Computer Operations Coordinator	11	Computer Operations Coordinator	207
Computer Services Technician	8	Computer Services Technician	202
Construction & Restoration Specialist	10	Construction & Restoration Specialist	206
Construction Manager	15	Construction Manager	303
Coordinator - Personal Property Assessment	8	Coordinator - Personal Property Assessment	203
Coordinator - Recycling Center	7	Coordinator - Recycling Center	114
Corporal - Corrections	11	Corporal - Corrections	208
Correctional Officer	8	Correctional Officer	204
Correctional Peace Officer	10	Correctional Peace Officer	207
Corrections Caseworker	9	Corrections Caseworker	205
Corrections Program Analyst	11	Corrections Program Analyst	208
Corrections Program Coordinator	10	Corrections Program Coordinator	207
County Assessor		County Assessor	
County Auditor	15	County Auditor	303
County Counselor	18	County Counselor	308
County Engineer	17	County Engineer	306
County Executive		County Executive	
County Planner II	11	County Planner II	207
County Planner III	12	County Planner III	208
County Public Administrator	13	County Public Administrator	210
County Registrar	13	County Registrar	210
County Sheriff		County Sheriff	
Court Security Aide	6	Court Security Aide	114
Crime Scene Investigator	9	Crime Scene Investigator	204
Forensic Lab Director	13	Criminalistics Laboratory Director	210
Custodian	5	Custodian	109
Deputy - Bailiff	10	Deputy - Bailiff	206



EXHIBIT 5C (CONTINUED)
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Deputy - Prisoner Transport	11	Deputy - Prisoner Transport	208
Deputy - Process Server	10	Deputy - Process Server	206
Deputy Public Administrator	7	Deputy Public Administrator	114
Detective	12	Detective	209
Director - Administration	19	Director - Administration	308
Director - Community Development	17	Director - Community Development	306
Director - Community Health & Environment	17	Director - Community Health & Environment	306
Director - Corrections	16	Director - Corrections	304
Director - Dispatch & Alarm	15	Director - Dispatch & Alarm	303
Director - Facilities Maintenance	15	Director - Facilities Maintenance	303
Director - Finance	17	Director - Finance	306
Director - Human Resources	15	Director - Human Resources	303
Director - Information Systems	17	Director - Information Systems	306
Director - Parks & Recreation	15	Director - Parks & Recreation	303
Director - Transportation	15	Director - Transportation	304
Director - Workforce Development	15	Director - Workforce Development	304
Director of Elections		Director of Elections	
Dispatcher	9	Dispatcher	204
District Supervisor	12	District Supervisor	208
Division Dir - Bldg Code Enf & Construct Mgmt	15	Division Dir - Bldg Code Enf & Construct Mgmt	303
Division Director - Development Review	15	Division Director - Development Review	303
Division Director - Environ Health & Protection	14	Division Director - Environ Health & Protection	301
Division Director - Humane Services	14	Division Director - Humane Services	301
Division Director - Neighborhood Pres	14	Division Director - Neighborhood Pres	301
Division Director - Planning	14	Division Director - Planning	301
DJO - Court Services	10	DJO - Court Services	206
DJO - Court Services - Senior	11	DJO - Court Services - Senior	207
DJO - Detention	9	DJO - Detention	204
Election Assistant	9	Election Assistant	203
Electronics Technician	10	Electronics Technician	206
Emergency Management Officer	9	Emergency Management Officer	203
Emergency Management Planner	11	Emergency Management Planner	207
Engineering Analyst	10	Engineering Analyst	205
Engineering Inspector II	10	Engineering Inspector II	206
Environmental Public Health Specialist	10	Environmental Public Health Specialist	206
Equipment Mechanic	9	Equipment Mechanic	204
Erosion Control Inspector	10	Erosion Control Inspector	206
Executive Assistant	10	Executive Assistant	205
Executive Assistant - Council at Large	11	Executive Assistant - Council at Large	207
Executive Assistant - County Executive	11	Executive Assistant - County Executive	207
FA - Box Office Manager	10	FA - Box Office Manager	205
FA - Concession/ Warehouse Manager	10	FA - Concession/ Warehouse Manager	205
FA - Event/Conversion Manager	10	FA - Event/Conversion Manager	205
FA - Facilities Manager	13	FA - Facilities Manager	210
FA - Finance Manager	12	FA - Finance Manager	208
FA - Food And Beverage Manager	13	FA - Food And Beverage Manager	210
FA - General Maintenance Technician	8	FA - General Maintenance Technician	202
FA - General Manager	16	FA - General Manager	304
FA - Government Services Rep II	6	FA - Government Services Rep II	113
FA - HVAC Specialist	10	FA - HVAC Specialist	205
FA - Manager of Arena Services	12	FA - Manager of Arena Services	208
FA - Manager Of Operations	13	FA - Manager Of Operations	210
FA - Marketing/ Group Sales Manager	10	FA - Marketing/ Group Sales Manager	205
FA - Suite/Club Manager	10	FA - Suite/Club Manager	205



EXHIBIT 5C (CONTINUED)
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Facility Manager - YAP	10	Facility Manager - YAP	206
Family Court Coordinator	10	Family Court Coordinator	205
Family Court Legal Counsel I	12	Family Court Legal Counsel I	209
Family Court Legal Counsel II	13	Family Court Legal Counsel II	210
Field Appraiser	8	Field Appraiser	203
Field Auditor	7	Field Auditor	114
Field Auditor/Investigator	9	Field Auditor/Investigator	204
Field/Property Maintenance Worker I	5	Field/Property Maintenance Worker I	111
Field/Property Maintenance Worker II	6	Field/Property Maintenance Worker II	113
Financial Services Administrator	9	Financial Services Administrator	205
First Assistant Prosecuting Attorney	15	First Assistant Prosecuting Attorney	303
Fiscal Manager	11	Fiscal Manager	207
Fleet Coordinator	10	Fleet Coordinator	205
Food Service Worker	5	Food Service Worker	109
Forensic Scientist	10	Forensic Scientist	205
General Maintenance Technician	8	General Maintenance Technician	202
GIS Analyst	11	GIS Analyst	207
GIS Architect		GIS Architect	209
GIS Services Manager	13	GIS Services Manager	210
GIS Supervisor		GIS Supervisor	208
GIS Technician I	8	GIS Technician I	203
GIS Technician II	9	GIS Technician II	204
New	New	GIS Technician III	205
Government Services Representative I	5	Government Services Representative I	110
Government Services Representative II	6	Government Services Representative II	113
Government Services Representative III	7	Government Services Representative III	114
Government Services Representative IV	8	Government Services Representative IV	203
Grant Administrator	11	Grant Administrator	207
Health Fiscal Supervisor	9	Health Fiscal Supervisor	205
Heavy Equipment Operator	9	Heavy Equipment Operator	205
Highway Construction Engineer	13	Highway Construction Engineer	210
Highway Construction Manager	14	Highway Construction Manager	301
Highway Project Manager	14	Highway Project Manager	301
Highway Projects Engineer	13	Highway Projects Engineer	210
Highway Superintendent	14	Highway Superintendent	301
Highway Traffic Engineer	13	Highway Traffic Engineer	210
Horticulture Specialist	7	Horticulture Specialist	114
Horticulture Supervisor	10	Horticulture Supervisor	206
Human Resources Coordinator	8	Human Resources Coordinator	203
Human Resources Generalist I	10	Human Resources Generalist I	205
Human Resources Generalist II	12	Human Resources Generalist II	208
HVAC Technician	9	HVAC Technician	204
Informational Systems Coordinator	9	Informational Systems Coordinator	205
Investigator	11	Investigator	207
Juvenile Officer / Family Court Administrator	15	Juvenile Officer / Family Court Administrator	303
Kennel Supervisor	8	Kennel Supervisor	203
Land Use Manager	13	Land Use Manager	210
Lead Agricultural Appraisal	10	Lead Agricultural Appraisal	206
Lead GIS Technician	10	Lead GIS Technician	205
Lead Housekeeper	6	Lead Housekeeper	111
Leadperson/Operator	10	Leadperson/Operator	205
Legal Secretary I	7	Legal Secretary I	203
Legal Secretary II	8	Legal Secretary II	204
Licensed Practical Nurse	9	Licensed Practical Nurse	204



EXHIBIT 5C (CONTINUED)
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Lieutenant	13	Lieutenant	210
Litigation Assistant	11	Litigation Assistant	207
Mail Services Specialist	5	Mail Services Specialist	109
Management Analyst III	13	Management Analyst III	210
Parks Acquisition Coordinator	11	Manager of Business Operations	207
Market Research Coordinator	10	Market Research Coordinator	206
Mosquito Control Program Coordinator	9	Mosquito Control Program Coordinator	204
Municipal Court Administrator	13	Municipal Court Administrator	210
Municipal Court Clerk	8	Municipal Court Clerk	204
Municipal Judge	17	Municipal Judge	306
Natural Resources Specialist	7	Natural Resources Specialist	203
Natural Resources Supervisor	10	Natural Resources Supervisor	207
Neighborhood Preservation Inspector	9	Neighborhood Preservation Inspector	204
Network Engineer II	12	Network Engineer II	208
Nurse Practitioner II	14	Nurse Practitioner II	301
Nursing Program Assistant	6	Nursing Program Assistant	113
Nutritionist	10	Nutritionist	206
Occupancy/Market Research Technician	7	Occupancy/Market Research Technician	203
Office Program Coordinator	10	Office Program Coordinator	206
Operations and Training Coordinator	12	Operations and Training Coordinator	208
Park Assistant Supervisor - YAP	8	Park Assistant Supervisor - YAP	204
Park Maintenance Worker II	6	Park Maintenance Worker II	113
Park Planner II	11	Park Planner II	207
Park Ranger	10	Park Ranger	206
Park Supervisor	8	Park Supervisor	204
Parks Historian	11	Parks Historian	207
Parks Marketing Coordinator	9	Parks Marketing Coordinator	206
Parks Program Coordinator	9	Parks Program Coordinator	204
Payroll Coordinator	9	Payroll Coordinator	205
Personal Property Administrator	9	Personal Property Administrator	205
Personal Property Manager	11	Personal Property Manager	207
Plan Review Engineer II	11	Plan Review Engineer II	207
Plan Review Engineer III	12	Plan Review Engineer III	208
Police Captain	15	Police Captain	303
Police Lieutenant	14	Police Lieutenant	301
Police Officer	12	Police Officer	209
Police Sergeant	13	Police Sergeant	210
Printer	8	Printer	202
Program Coordinator	11	Program Coordinator	208
Program Specialist I	7	Program Specialist I	113
Program Specialist II	8	Program Specialist II	202
Project Manager	14	Project Manager	301
Prosecuting Attorney		Prosecuting Attorney	
Psychologist	13	Psychologist	210
Public Affairs Coordinator	11	Public Affairs Coordinator	207
Public Health Educator	9	Public Health Educator	205
Public Health Information Officer	10	Public Health Information Officer	206
Community Health Nurse I	10	Public Health Nurse I	205
Community Health Nurse II	12	Public Health Nurse II	208
Purchasing Coordinator	9	Purchasing Coordinator	205
Purchasing Manager	13	Purchasing Manager	210
Recorder of Deeds		Recorder of Deeds	
Regional Response Planner	13	Regional Response Planner	210
Registered Nurse - Corrections	12	Registered Nurse - Corrections	208



EXHIBIT 5C (CONTINUED)
PROPOSED GRADE ORDER LIST

Pay plan Title	Current Grade	Proposed Title	Proposed Grade
Revenue Technician	9	Revenue Technician	203
Review Appraiser	9	Review Appraiser	204
Right of Way Specialist	12	Right of Way Specialist	208
Risk Manager	14	Risk Manager	301
Senior Career Counselor	10	Senior Career Counselor	206
Senior Forensic Scientist	11	Senior Forensic Scientist	207
Senior Forensic Scientist	11	Senior Forensic Scientist	207
Senior Park Ranger	11	Senior Park Ranger	208
Sergeant	12	Sergeant	209
Special Assessments Manager	11	Special Assessments Manager	207
Staff Auditor	11	Staff Auditor I	207
New	New	Staff Auditor II	208
Suicide Prevention Coordinator	13	Suicide Prevention Coordinator	210
Suicide Prevention Officer	9	Suicide Prevention Officer	205
Superintendent - Juvenile Justice Center	13	Superintendent - Juvenile Justice Center	210
Superintendent of Parks	11	Superintendent of Parks	208
Supervisor - Building Services	10	Supervisor - Building Services	207
Supervisor - Child Welfare	13	Supervisor - Child Welfare	210
Supervisor - Court Services	13	Supervisor - Court Services	210
Supervisor - Dispatch	10	Supervisor - Dispatch	207
Supervisor - Food Services	10	Supervisor - Food Services	206
Supervisor - General Maintenance	11	Supervisor - General Maintenance	208
Supervisor - HVAC	11	Supervisor - HVAC	208
Supervisor - Intake	13	Supervisor - Intake	210
Supervisor - Residential Appraisal	10	Supervisor - Residential Appraisal	206
System Architect	13	System Architect	210
System Engineer I	12	System Engineer I	209
System Engineer II	13	System Engineer II	210
System Engineer III	New	System Engineer III	301
System Engineering Manager	15	System Engineering Manager	304
System Technician I	9	System Technician I	204
System Technician II	11	System Technician II	206
System Technician III	New	System Technician III	209
Teacher	9	Teacher	203
Technical Services Manager	13	Technical Services Manager	301
Title Processor	9	Title Processor	203
Training/Quality Assurance Officer	11	Training/Quality Assurance Officer	207
Truck Driver/Laborer I	6	Truck Driver/Laborer I	113
Truck Driver/Laborer II	8	Truck Driver/Laborer II	202
Veterinary Aide	6	Veterinary Aide	113
Veterinary Technician	7	Veterinary Technician	114
Victim Advocate	9	Victim Advocate	203
Victim Advocate Coordinator	11	Victim Advocate Coordinator	207
Victim Assistance Counselor	10	Victim Assistance Counselor	206
Video Production Assistant	7	Video Production Assistant	114
Video Production Coordinator	9	Video Production Coordinator	204
Video Production Manager	11	Video Production Manager	208
Voting Systems Supervisor-Partisan	11	Voting Systems Supervisor-Partisan	206
Waste Water System Inspector	10	Waste Water System Inspector	206
Web Services Technician	9	Web Services Technician	204
WIC/Nutrition Manager	12	WIC/Nutrition Manager	208
Wireless Communications/Network Spec I	9	Wireless Communications/Network Spec I	204
Wireless Communications/Network Spec II	10	Wireless Communications/Network Spec II	206
Wireless Communications/Network Spec III	11	Wireless Communications/Network Spec III	209
Youth Specialist	8	Youth Specialist	202



The proposed grade order list assumes the County desires to maintain a compensation system competitive with market values as well as ensure internal equity is maintained. This recommendation has several implementation options, or methods to transition employees into the new system, with various costs. The options include:

- **Bring to Minimum** – This approach maintains employee salaries as-is unless their existing salary falls below their newly assigned pay grades minimum. When this occurs, the employee's salary is raised to the new minimum to bring them into range.
- **Range Penetration** – This approach applies each employee's current pay range penetration percentage to their newly assigned pay grade. That is, if an employee is currently 40 percent into their current pay grade's range, they are placed 40 percent into their newly assigned pay grade's range.
- **Classification Date Parity** – This approach places employees into their newly assigned pay grade based on their years of experience in that classification compared to the length of a typical career. In this model, an employee with 15 years of experience in their current classification is expected to be 50 percent into their pay grade range based on a 30 year career ($15 \text{ years} / 30 \text{ years} = 50\%$). Employees whose salaries are already at or above this expected amount are unchanged, but employees whose current salaries fall below this expected amount are brought up to this level. This option best addresses compression.

There is not a “correct” approach for transitioning employees into the proposed system; however, because compression was not found to be a significant issue in the County’s current system, Evergreen recommends the range penetration approach for transitioning to the new system. It is also recommended that any Merit or COLA increase for 2016 be applied after range penetration.

FINDING

As part of this study, Evergreen was tasked with developing a recommended schedule for future evaluations of County job classifications. The County does not currently have an established systematic approach or schedule for evaluation of classifications. An established process allows for assessment of a classification(s) to determine if internally, it is compensated equitably in comparison to other like classifications and assists with collecting the data necessary to determine if the classification is titled correctly. A well-established schedule allows for evaluation of positions: as requested by employees or supervises when there is evidence that a position’s primary duties have changed; when a classification is newly created; and/or at regular intervals to ensure that internal equity is maintained across the organization.

The tool used by Evergreen to assess internal job worth as part of this study was the Job Assessment Tool (JAT). The results of this tool, paired with market data, provided a final, data-driven value that was used to match the classification under review up to an appropriate midpoint on the County’s proposed salary schedule. With all County classifications now assessed and slotted using this methodology, the County has an



excellent foundation on which to base compensation and classification related decisions surrounding any position. Moving forward, the County should employ the same methodology to continually assess positions.

RECOMMENDATION 4: Adopt the Job Assessment Tool and market data based methodology from Evergreen to evaluate new and updated position titles, and conduct a comprehensive review of all classifications every two years.

The County should adopt the JAT and market driven approach to be used for all future job evaluations. This process serves as an unbiased means to capture a snapshot of a position's current duties and requirements, as well as identify a reasonable level of compensation that aligns with the internal equity established during the course of this study. Every two years, the County should use the JAT to assess all job classifications, updating JAT scores where appropriate and re-running the regression analysis that yields appropriate slotting of all positions. Note that upon completion of this study, Evergreen is providing County staff with a half day of training on using the study methodology and tools.

Although all classifications should be evaluated every two years, the County should also establish a mechanism or process to evaluate new and/or updated position titles as needed between review cycles. Evergreen recommends the following process to address this:

1. Department Head/Supervisor submits completed Job Review Form to Human Resources to request a job evaluation for either a new or existing position. The proposed form is displayed in **Exhibit 5D**. Note that one form per job should be submitted.
2. Human Resources (HR) staff receives completed Job Review Form and determines what action is needed; if action requires completion of JAT, a blank JAT is emailed by HR to Department Head/Supervisor for completion. If the position is new, the JAT should be filled out by the person with the most knowledge of the position. If no JAT is needed, HR staff proceeds to Step 5.
3. Department Head/Supervisor completes JAT and submits to HR within 5 business days.
4. HR receives and reviews JAT for accuracy. Score is input into existing regression database (provided by Evergreen).
5. If market data on file is greater than one year old or not available for the position in question, fresh market data is collected from established peers.
6. Average market midpoint is entered into existing regression database by HR.



EXHIBIT 5D
PROPOSED JOB REVIEW FORM - PART ONE

Job Review Form
ST. CHARLES COUNTY, MO

Please complete all fields, scan, and electronically submit to the Human Resources Department. Please allow as many as 14 business days for processing.

DEPARTMENT HEAD COMPLETES

Requester Name and Title:	
Phone:	
E-mail Address:	
Department:	
Today's Date:	
Job Title for Review:	
Position Type (New or Existing):	
Reason for Review:	
Expected outcome:	

Job Review Form

7. With JAT and market data, the regression database provides HR staff with an approximate midpoint. This midpoint is used to place the position on the County's salary schedule.
8. HR staff record final recommended pay grade and job title in the second section of the Job Review Form within 14 days of receiving request (see Exhibit 5E).
9. Submission of the final recommended pay plan and assignment of position classifications to the pay ranges goes to the merit commission for review and recommendation to the County Executive and County Council as required by Article VII of the County Charter.
10. A copy is emailed to the Department Head/Supervisor, as well as to the County Administrator for final approval. If administration agrees with the revision, send the new or updated position being put into a classification or reclassified to the Council for Council approval of the requested classification or reclassification of the position.



With this process in place, and continued use of the JAT and market data in making classification and compensation decisions, the County will ensure an equitable system is maintained. As noted, as part of this project, Evergreen will also be providing HR staff with JAT training and access to all the tools necessary to continue this process.

EXHIBIT 5E
PROPOSED JOB REVIEW FORM - PART TWO

HR USE ONLY		
Form Received by:		
Form Reviewed by:		
Today's Date:		
Action:		
JAT Sent (Y/N):	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Market Data Needed (Y/N):	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Final JAT Score		
Market Midpoint Value		
Regression Midpoint		
Title Recommendation:		
Grade Recommendation:		
Explanation of Findings:		
Reviewer Notes:		
Signature: _____		Signature: _____
Director of HR		Department Head
Date: _____		Date: _____

FINDING

Any organization's compensation and classification system will need periodic maintenance. The recommendations provided in this chapter were developed based on conditions at the time the data were collected. Without proper upkeep, recruitment and retention issues may arise as the compensation and classification system becomes dated and less competitive.

While it is unlikely that the compensation plan as a whole will need to be adjusted for several years, a select group of classifications' pay grades may need to be reviewed more frequently. If one or more County classifications are experiencing high turnover or are having difficulty with recruitment, the County should collect salary range data from peer



organizations to determine whether an adjustment should be made to classification grades in question.

RECOMMENDATION 5: Conduct small-scale salary surveys as needed to assess the market competitiveness of hard-to-fill classifications and/or classifications with retention issues, and make adjustments to pay grade assignments if necessary.

The County will be provided with the instruments used by Evergreen to conduct proper market analysis. These tools should be used to maintain consistency in market analysis methodology moving forward using a research-based and field tested approach.

FINDING

In order to maintain competitiveness between compensation and classification studies, an organization should continue adjusting its pay plan on an annual basis, if required. Rather than relying only on consumer price index (CPI) values for cost of living adjustments, the organization would benefit from contacting their local peer group and determining their approach to pay plan adjustments and in addition to considering economic indicators such as CPI.

Even with these efforts to maintain the effectiveness of a classification and compensation system, an organization may find it struggles to navigate through changing economic conditions and with organizations competing for the same human resources. For this reason, an organization should conduct a comprehensive classification and compensation study every three years.

RECOMMENDATION 6: Conduct a comprehensive classification and compensation study every three years.

The recommendations in this chapter provide a competitive pay plan, internally equitable classification structure, and system administration practices that will provide the County with a responsive compensation and classification system for years to come. While the upkeep of this recommended system and associated pay and classification guidelines will require work, the County will find that having a competitive compensation and classification system that encourages strong recruitment and employee retention is well worth the effort.



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 San Miguel 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.



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.



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 Study and Compensation Survey City of Page, Arizona

Evergreen Solutions is engaged with the City of Page to conduct a Classification Study and a Compensation Survey for all 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 salary and benefits 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 to the City. **Note:** This project is nearing completion.

