A Technical Proposal to Conduct a Total Rewards Study for the City of Gainesville, FL
RFP #HRDX-180040-GD

ORIGINAL

Evergreen Solutions, LLC

November 30, 2017

A Technical Proposal to Conduct a Total Rewards Study for the City of Gainesville, FL
RFP #HRDX-180040-GD

Submitted to:

Ms. Gayle Dykeman
General Government Procurement Division
City of Gainesville
200 East University Avenue, Room 339
Gainesville, Florida 32601

Submitted by:

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

November 30, 2017

November 29, 2017

Ms. Gayle Dykeman
General Government Procurement Division
City of Gainesville
200 East University Avenue, Room 339
Gainesville, Florida 32601

Dear Ms. Dykeman:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Total Rewards Study for the City of Gainesville. Our response is based on our review of your Request for Proposal (RFP #HRDX-180040-GD), our understanding of the Florida labor market, our experience in working with hundreds of local governments, **including the City of Gainesville**, and our knowledge of best practices in human resources management.

Evergreen was formed in 2004 and is a certified W/MBE firm in Florida. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 45 states. Evergreen has conducted over 400 HR studies for local governments and other public sector organizations throughout the county, the majority of which were located in Florida.

The following is a list of some of the Florida local government clients that our consultant team has worked with, or is currently on contract to work with, that involved services similar in scope to those being requested: City of Gainesville; City of Lake City; City of Ocala; City of St. Cloud; City of Kissimmee; City of Maitland; City of Orlando; City of Holly Hill; City of High Springs; City of Dania Beach; City of Ft. Myers; City of North Port; City of Cape Coral; City of Palm Beach Gardens; City of Sunrise; City of Coral Springs; City of Tamarac; City of North Miami Beach; City of Hollywood; City of Plantation; City of Cocoa; City of Daytona Beach; City of Orange City; City of Winter Park; City of Bartow; City of St. Petersburg; City of Dunedin; City of Bushnell; City of Panama City Beach; City of Fort Walton Beach; City of Sunny Isles Beach; City of Sebring; City of Key West; City of Sarasota; Manatee County; Seminole County; Martin County; Lake County; Hernando County; Sarasota County; Charlotte County; Monroe County; Osceola County; Citrus County; Highlands County; Miami-Dade County; Alachua County; Escambia County; Pinellas County; Town of Jupiter; Town of Cutler Bay; Town of Davie; Town of Longboat Key; Village of Pinecrest; Village of North Palm Beach; Miami Shores Village; and many others. A description of the services provided to these clients can be found in **Section 1** of our proposal.

Outside of the State of Florida, our consultant team has worked with, or is currently on contract to work with, the following local governments in providing similar work to that being requested: City of Statesboro, GA; City of Kingsland, GA; City of Alpharetta, GA; City of Douglasville, GA; City of Savannah, GA; City of Garden City, GA; City of Dahlonega, GA; City of Roswell, GA; City of Tybee Island, GA; City of Brookhaven, GA; City of Chamblee, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Blount County, TN; Mahoning County, OH; City of Bloomington, IN; City of Pittsburgh, PA; County of Montgomery, PA; City of Kalamazoo, MI; City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; Clay County, MO; St. Charles County, MO; Jefferson County, MO; Sedgwick County, KS; Kent County Levy Court, DE; City of Annapolis, MD; City of Westminster, MD; City of Hyattsville, MD; Allegany County, MD; Washington County, MD; City of Fredericksburg, VA; City of Williamsburg, VA; City of Newport News, VA; City of Suffolk, VA; County of Culpeper, VA; Gloucester County, VA; Essex County, VA; Loudoun County, VA; Spotsylvania County, VA; Montgomery County, VA; James City County, VA; Prince George County, VA; Isle of Wight County, VA; Louisa County, VA; Gaston County, NC; New Hanover County, NC; Union County, NC; Guilford County, NC; Charleston County, SC; Berkeley County, SC; Dorchester County, SC; City of Goose Creek, SC; City of Lancaster, SC; City of Columbia, SC; City of Chester, SC; City of Mauldin, SC; Town of Mount Pleasant, SC; Town of Hilton Head

Island, SC; Town of Moncks Corner, SC; City of Fountain, CO; City of Manitou Springs, CO; San Miguel County, CO; City of Page, AZ; Town of Sahuarita, AZ; Town of Little Elm, TX; City of Austin, TX; City of Pflugerville, TX; City of Pearland, TX; City of Seguin, TX; City of Rowlett, TX; City of Mont Belvieu, TX; City of Sunset Valley, TX; City of Fredericksburg, TX; City of Gonzales, TX; City of Athens, TX; City of Sachse, TX; City of Amarillo, TX; City of Duncanville, TX; Denton County, TX; Travis County, TX; City of Santa Fe, NM; City of Carlsbad, NM; City of Broken Arrow, OK; and many others.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Gainesville because of our vast understanding of local government human resources, and the fact that we possess the necessary experience and expertise. Information regarding our team's qualifications and experience can be found in **Section 2.** Detailed resumes are available upon request.

Some of the human resource services Evergreen has focused on include: total rewards studies; classification and compensation studies; salary and benefits surveys; performance management studies; recruitment, hiring, and retention studies; strategic and workforce planning; staffing studies; and disparity studies.

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 a compensation system is to the overall operation of a proficient and progressive municipality. 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 total rewards 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 our 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, City administrators, department directors, and employees should be involved in the process. This is a critical component of our communication plan. Constant communication is ensured through the use of meetings/conference calls and the submission of written progress reports.

- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web.

- 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, I am authorized to commit our firm contractually to this engagement. We have reviewed your general terms and conditions, and we acknowledge that we would be able to work within your requirements. Attached are the required forms from the RFP, including the reference form.

We appreciate this opportunity to work again with the City of Gainesville. If you have any questions, please contact me at (850) 383-0111 or via email at jeff@consultevergreen.com.

Sincerely,

Dr. Jeff Ling, Executive Vice-President
Evergreen Solutions, LLC

DRUG-FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

_____Evergreen Solutions, LLC_____ does:
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.

3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).

4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.

6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

_____
Bidder's Signature

_____
Date   11/28/17

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CITY OF GAINESVILLE

N/A

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for

_____ a living wage of $11.8269 per hour to covered employees who receive Health Benefits from the undersigned employer and $13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: Evergreen Solutions
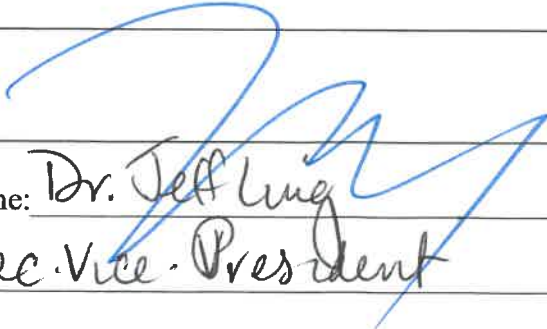
Address: 2878 Remington Green Circle, Talla, Fl 32308

Phone Number: (850) 383-0111

Name of Local Contact Person N/A

Address: _____

Phone Number: _____

$_____
(Amount of Contract)

Signature: _____ Date: 11/28/17

Printed Name: Dr. Jeff Ling

Title: Exec. Vice. President

This RFP is not
a covered service

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LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit C hereto)

Check one:

☑ Living Wage Ordinance does not apply
(check all that apply)
- ☑ Not a covered service
- ☑ Contract does not exceed $100,000
- ☐ Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
- ☐ Located within the City of Gainesville enterprise zone.

☐ Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

PROPOSAL RESPONSE FORM – SIGNATURE PAGE

(submit this form with your proposal)

TO: City of Gainesville, Florida
                200 East University Avenue
                Gainesville, Florida 32601

PROJECT: Total Rewards Study

RFP/RFQ#:   HRDX-180040-GD

RFP/RFQ DUE DATE: November 30, 2017

Proposer's Legal Name: _Evergreen Solutions, LLC_

Proposer's Alias/DBA: _N/A_

Proposer's Address: _2878 Remington Green Circle_
Tallahassee, Fl 32308

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)

Name: _Dr. Jeff Ling_

Date: _____

Telephone Number _(850) 383-011_

Fax Number _(850) 383-151_

Email address _jeff@consultevergreen.com_

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s _1_ , _____, _____,
to these Specifications.

TAXES

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

LOCAL PREFERENCE (check one)

Local Preference requested: ☐ YES   ☑ NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions)   ☐ YES   ☑ NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions)

☐ YES ☑No

SERVICE-DISABLED VETERANS' BUSINESS (check one)

Is your business certified as a service-disabled veterans' business? ☐ YES ☑NO

LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit C hereto)

Check One:

☑ Living Wage Ordinance does not apply
(check all that apply)
    ☐ Not a covered service
    ☑ Contract does not exceed $100,000
    ☐ Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
    ☐ Located within the City of Gainesville enterprise zone.

☐ Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.
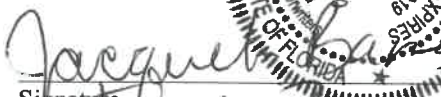
NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

SIGNATURE ACKNOWLEDGES THAT: (check one)

☑ Proposal is in full compliance with the Specifications.

☐ Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:

Signature
By: _Jacqueline Barnes_
Title: _Administrative Assistant_

11/28/17
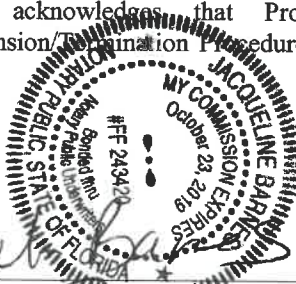
(CORPORATE SEAL)
PROPOSER:

Signature
By: _Dr. Jeff Ling_
Title: _Exec. Vice-President_

BUSINESS REFERENCES

BIDDER: Evergreen Solutions, LLC

PROJECT: Total Rewards Study

BID#: HRDX-180040-GD

BID DUE DATE: November 30, 2017

Provide the following business reference information for three clients that a same or similar project has been provided within the past five years. You may include other pertinent information.

#1 Dates of Engagement (i.e. 6/2017 to 9/2017): 11/15/15 to 1/31/17 **Project Amount $** 58,000

Project Client Name:	City of Ft. Myers, FL
Project Scope:	Classification and Compensation Study
City, State Zip:	Ft. Myers Florida 33901
Client Contact Name:	Ellen Clyatt, Compensation Manager
Phone Number:	(239) 321-7064 Fax Number: (239) 344-5986
Email Address:	EClyatt@cityftmyers.com

#2 Dates of Engagement (i.e. 6/2017 to 9/2017): 6/1/15 to 7/1/16 **Project Amount $** 83,500

Project Client Name:	Alachua County, FL
Project Scope:	Compensation and Classification Study
City, State Zip:	Gainesville, Florida 32627
Client Contact Name:	Karen Gerding
Phone Number:	(352) 374-5219 Fax Number: (352) 374-5233
Email Address:	Kpg@alachuacounty.US

#3 Dates of Engagement (i.e. 6/2017 to 9/2017) 2/2/16 to 4/30/16 **Project Amount $** 65,800

Project Client Name:	City of Orlando, FL
Project Scope:	Compensation Study
City, State Zip:	Orlando, Florida 32802
Client Contact Name:	Ana Palenzuela
Phone Number:	(407) 246-2235 Fax Number: (407) 246-2019
Email Address:	ana.palenzuela@cityoforlando.net

ADDENDUM NO. 1

CITY OF
GAINE VILLE
every path   starts with passion
FLORIDA

Date: November 17, 2017

Bid Date: November 30, 2017
at 3:00 P.M. (Local Time)

Bid Name Total Rewards Study

Bid No.:   HRDX-180040-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), November 16, 2017. Questions may be submitted as follows:

> Email: dykemangb@cityofgainesville.org
> or
> Faxed (352) 334-3163
> Attention: Gayle Dykeman

2. Please find attached:

> a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received prior to the deadline for questions (11/16/2017):

3. Question: What have been past Human Resources projects by the City of Gainesville in the last two years?
    Answer: None

4. Question: What other consultant companies have done prior work for the City of Gainesville?
    a)   Compensation – Milliman, Wachovia, Evergreen Solutions, Cody & Associates, Dr. Lopez
    b)   Benefits - Gallagher Benefits Group, Lockton Companies, Siver Risk Management
    c)   Other HR consulting/talent strategy – Mycoff, Fry and Prouse; Mercer Group; N2Growth; Colin Baenziger; Springsted and Waters.
    Answer: Provided above

5. Question: Do you have a defined employee value proposition (EVP) and employer brand? If yes, what is your EVP statement and employer brand tag line?
    Answer: City doesn't have a defined employee value propositions. Below are some recent employer brand tag lines that are used by Talent Acquisition staff:
    Come enjoy the Gainesville way of life!
    The City of Gainesville is seeking a dynamic and experienced individual who is innovative and forward thinking who will embrace the organization's citizen-centered vision. The community,

its elected leaders, and executive leadership team have embraced this vision.

Embracing change is the Gainesville way of life!
Come join our team as we shift the culture from "No to Yes," "from reactive to proactive," "from policy-oriented to services-oriented," and "from silos to teams."

6. Question: Has an inventory of programs for Compensation, Benefits and Work/Life Effectiveness been completed within the last two years? If so, can you share with us?
   Answer: No

7. Question: Is there a budget set for the total Rewards Study?
   Answer: Yes

8. Question: May we receive a copy of the prior rewards studies you had conducted in 2006 and 2008?
   a) What were the fees associated for the study?
   Answer: Copies are attached separately in DemandStar.
   a) Fees associated with these studies are in archives and staff feels that these fees are not relevant to today's pricing.

9. Question: Do you currently have updated job descriptions and organizational charts?
   Answer: Job descriptions are available on the City of Gainesville's website https://www.governmentjobs.com/careers/gainesville/classspecs. Please note staff is aware of inaccurate salary ranges in the job descriptions. Staff is working with NeoGov to correct as quickly as possible. Organizational charts are not available.

10. Question: What jobs or employee segments are considered critical with the City of Gainesville?
    Answer: The following jobs have long standing recruitment issues: Engineers, Information Technology, Electric Line Workers, Building Inspectors, Plans Examiners, Mosquito Control Services Technicians

11. Question: Is there a rewards philosophy in place for the city of Gainesville? Can it be shared?
    Answer: The City of Gainesville's Compensation Philosophy is to have a total compensation and benefit system that attracts and retains a diverse group of highly qualified individuals and motivates employees to achieve short-term and long-term organizational objectives. This is accomplished by providing, in consideration of budgetary constraints, total compensation (including benefits) that is competitive with the market median for the appropriate labor markets for each type of job classification and is linked to performance.

12. Question: How many benefits plans (health, disability, life and retirement) are currently in place for each subgroup/department/employee segment?
    Answer: The City offers one health plan, three dental choices, Short-term Disability, both a Group Life and voluntary life option, vision, and a legal product, these are available to each employee group. The individual and overall benefit program can be viewed at:
    http://www.cityofgainesville.org/RiskManagementDepartment/EmployeeCentral/YourBenefits.aspx

The City manages two defined benefit retirement plans, one for the non-public safety employees and one for sworn public safety employees. It also has a defined contribution plan (401a) available to professional and management employees upon approval of the appropriate Charter Officer.

13. Question: Can you share your 2017 benefits booklet?
    Answer: http://www.cityofgainesville.org/Portals/0/risk/Benefits/2017%20Benefit%20Booklet.pdf

14. Question: Are there materials for total rewards communications related to the project to be translated? If so, how many/what languages?
    Answer: No

15. Question: Does the City have an online portal that employees use to learn more about their benefits?
    Answer: Yes, employees can access their benefits through Employee Self-Service and on the City's employee intranet, they can view presentations, FAQ's and videos related to their benefits programs

16. Question: What other firms have been invited to participate in the RFP?
    Answer: The list of plan holder firms for this RFP can be viewed at Demandstar.com.

17. Question: Who is expected to be on the City of Gainesville's project team?
    Answer: Equal Opportunity Director, Human Resources Director, and Risk Management Director

18. Question: In the description of approach to the work, this statement is unclear: "Description of how you will deal with different Total Rewards systems, driven by market or internal equity and how you will measure the market and apply that information." Can you define this statement to better understand what is expected?
    Answer: This is intentionally left vague as staff is relying on the subject matter experts to define their unique approach to the work.

19. Question: Is there any reason for having the work completed within 90 days of the contract award?
    Answer: Yes, the FY19 budget planning process begins in March 2018 and the consultant will present recommendations in April/May 2018.

20. Question: Upon completing the Total Rewards Study project, when are you targeting commencement of communications and to implement changes?
    a. When do you expect to complete communication activities requiring consultant support?
    Answer: Communications has begun and will continue throughout the process until fully implemented.
    a. Consultant's support will be considered complete after presentation to City Commission with a summary of the consultant's report and proposed implementation plan.

21. Question: Are you anticipating the vendor will conduct an external total rewards survey (including base pay, benefits such as medical, retirement, and paid leave, work/life programs, and pay practices) of your comparators?

Answer: Yes

22. Question: Do you have a predetermined list of comparators that you want to include in the survey? If so, please share.

Answer: No

23. Question: Do you want both public and private market data considered?

Answer: Yes

24. Question: The RFP references the City's Compensation (Total Rewards) Philosophy. Please share your stated philosophy.

Answer: See question #11 for the City's Compensation Philosophy. Currently the City does not have a Total Rewards Philosophy.

25. Question: The RFP indicates that the City requests a final report 90 days after the engagement. Is there any flexibility in your timeline?

Answer: No

26. Question: Is there a budget for the study?

Answer: Yes

27. Question: What challenges are they currently experiencing related to compensation; what business issues are they trying to solve?

Answer: Employee Engagement, Living Wage, Compression, Outdated Salary Structures, effectiveness of Progression through Training programs, Hard to Fill positions

28. Question: What is the compensation/Total Rewards philosophy?

Answer: See question #11 for the City's Compensation Philosophy. Currently the City does not have a Total Rewards Philosophy.

29. Question: In addition to providing benchmarking data around compensation for their roles, do you want an analysis of current incumbent data relative to the market (i.e. market 50th percentile)?

Answer: Yes

30. Question: How is compensation administered internally? Do you have training needs we should consider?

Answer: Administered through the Division of Classification and Compensation. Training for managers on compensation is currently not offered and would be an advantage.

31. Question: Do you have an existing salary structure that needs to be updated or is the intent to have one built?

Answer: Depends on the findings of the study and the consultant's recommendation

32. Question: Do you offer any incentive plans?
    Answer: No

33. Question: Are job descriptions and organizational charts up to date?
    Answer: See question #9

34. Question: Do you have title redundancies and if so, would you like the consultant to address this in our
    proposal?
    Answer: Yes, yes

35. Question: Are you aware of any leveling issues? If yes, what are these issues?
    Answer: Yes, between positions that have oversight over the entire organization (e.g., General
    Government and Gainesville Regional Utilities) versus positions that have similar lines of
    business for a single segment of the organization.

36. Question: Do you purchase salary surveys?
    Answer: No

37. Question: What tools, if any, do you subscribe to as it relates to the management of compensation?
    a. Are you interested in any compensation management tools?
    Answer: Yes, Economic Research Institute for salary for jobs and geographic salary variances.
    a. Yes

38. Question: How have total rewards historically been communicated to employees? Has the approach
    been effective? What gaps exist?
    Answer: No, total rewards system doesn't currently exist.

39. Question: Do different job classifications have different benefit offerings, or do all benefit eligible
    employees receive the same benefit offering?
    a. For example, do police have different medical benefits than firefighters or office personnel?
    Answer: Other than retirement plan differences already discussed, the benefits offering are the same.
    a. No differences for medical benefits.

40. Question: Please provide the number of plan offerings by benefit type:

    a. Medical/Rx - 1
    b. Dental - 3
    c. Vision - 1
    d. Life Insurance – 2 on group and one voluntary supplemental program
    e. Short-term Disability – Paid leave and 1 disability vendor, employee selects the specifics
    f. Long-term Disability – City's defined benefit plans offers disability retirement benefits,
       employer paid

    Answer: See above and answer from Question #12

41. Question. Are the Medical/Rx plans fully-insured or self-insured?

    a. Is the Rx benefit carved out (i.e. with a separate PBM) or is it with the Medical vendor?

   Answer: Self-funded with third-party administrator and specific stop-loss provisions

    a. Included in overall health benefit using Florida Blue PBM.

42. Question. Are the Dental plans fully-insured or self-insured?

   Answer: Fully-insured

43. Question. What type of retirement plan(s) do you have in place?

   Answer: General Pension, Police & Fire Pension; and 401(a) for designated employees.
          Summary plan descriptions can be found at:

http://www.cityofgainesville.org/RiskManagementDepartment/EmployeeCentral/RetirementPlanning.aspx

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

<div align="center">CERTIFICATION BY PROPOSER</div>

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: _Evergreen Solutions_

BY: _____

DATE: _11/22/17_

Table of Contents

Section 1
Qualifications of Firm

1.0 Qualifications of Firm

Evergreen is well qualified to conduct a Total Rewards Study for the City of Gainesville as our consultants have conducted hundreds of similar studies for local governments and other public sector organizations throughout the country, especially in the State of Florida. In this section we provide you with the history of our firm, our similar experience, the qualifications of our proposed project team, references, resources needed from City staff, and what our clients are saying about our consulting work. **Evergreen has met the minimum requirements outlined in the RFP as we have been in business providing human resources management consulting services, including strategic and organizational planning and the development and implementation of total rewards programs for over 13 years. Evergreen has extensive experience with union environments having worked with over 250 public sector clients in Florida.**

1.1
History of Firm

Evergreen Solutions is a national, multidisciplinary, public sector management consulting firm, which specializes in working with 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 is a limited liability company (LLC) that was formed in Florida in 2004 to 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 Solutions is a female-owned business, certified as an M/WBE in many states and municipalities across the country, including Florida.

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: total rewards studies; classification and compensation studies; market salary and benefits surveys; performance appraisal system design; workload analyses; recruitment, hiring, and retention studies; strategic and workforce planning; staffing studies; and labor pool availability.

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

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

- full visibility into the entire organization through research and discovery;

- a spirit of partnership with 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 total rewards studies for local governments and other public sector organizations throughout the country, especially in the State of Florida;

- comprehensive experience in all components vital to the successful completion of this project;

- knowledge of relevant Florida statutes and state 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 in providing a variety of human resources consulting.

Exhibit 1-1 includes a list of some of the local government and other public sector clients in the State of Florida that our consultant team has worked with, or is currently on contract to work with, that involved similar services to those being requested by the City of Gainesville.

Exhibit 1-1		
Select Florida Public Sector Clients		
Florida Sheriff's Association	City of Bartow	Hernando County
Florida Association of Counties	City of Holmes Beach	Citrus County
Florida League of Cities	City of Ft. Myers	Escambia County
Florida Board of Bar Examiners	City of St. Petersburg	Pinellas County
FL Assoc. of Court Clerks & Comptrollers	City of Daytona Beach	Sarasota County
Florida Prepaid Tuition	City of Orange City	Martin County
Association for Institutional Research	City of Zephyrhills	Bay County
Confidential Office Personnel Association	City of Pensacola	Gulf County
Manatee County Sheriff's Office	City of Plant City	Village of Pinecrest
Okaloosa County Sheriff's Office	City of Plantation	Village of North Palm Beach
Martin County Sheriff's Office	City of Sarasota	Village of Islamorada
Nassau County Sheriff's Office	City of Sunny Isles Beach	Town of Ponce Inlet
Alachua County Sheriff's Office	City of Punta Gorda	Town of Juno Beach
Clay County Sheriff's Office	City of Deltona	Town of Palm Beach
Marion County Sheriff's Office	City of Temple Terrace	Town of Cutler Bay
Collier County Sheriff's Office	City of Kissimmee	Town of Davie
Pasco County Sheriff's Office	City of High Springs	WorkNet Pinellas (a/k/a CareerSource Pinellas)
Flagler County Sheriff's Office	City of Clermont	Sarasota-Manatee Airport Authority
Gadsden County Sheriff's Office	City of Orlando	Hillsborough Area Transit Authority
City of Fort Walton Beach	City of North Port	Toho Water Authority
City of Panama City	City of Gainesville	Tampa Bay Water
City of Destin	City of Key West	Health Care District of Palm Beach County
City of Sebring	City of Coral Springs	Keys Energy Services
City of Winter Park	City of Clermont	Orlando-Orange County Expressway Authority
City of Palm Beach Gardens	City of Cocoa	Manatee County Utility
City of Bunnell	City of North Miami Beach	Pinellas County Housing Authority
City of Bushnell	City of Dania Beach	Tampa Housing Authority
City of Ocala	City of Doral	Glades General Hospital
City of Venice	City of Sunrise	Loxahatchee River District
City of Tamarac	Manatee County	Southwest Florida Water Management District
City of St. Cloud	Sumter County	St. Johns River Water Management District
City of Lake City	Seminole County	Florida Keys Aqueduct Authority
City of Cape Coral	Gadsden County	Brevard County Property Appraiser's Office
City of Largo	Monroe County	Gadsden County Property Appraiser's Office
City of Hollywood	Charlotte County	Jacksonville Aviation Authority
City of Maitland	Osceola County	Solid Waste Authority of Palm Beach County
City of Dunedin	Alachua County	Community Action Stops Abuse
City of Holly Hill	Highlands County	Seacoast Utility Authority

As a result of our experience in professional roles, as well as work on past projects, the Evergreen Team has considerable experience in conducting total rewards studies and related consulting work for local governments and other public sector organizations. Full case studies or reports from any of our studies are available upon request.

1.2
Select
Relevant
Experience

Evergreen Solutions has conducted hundreds of classification and compensation studies for local governments and other public sector organizations across the country, especially in the State of Florida. Because of this, we include in this section only a sample of some of Evergreen's more recent work that involved services similar in scope to the services being requested by the City of Gainesville. **Note:** Because of Evergreen's extensive public sector experience, especially in Florida, we are well familiar with union environments and with utilities.

Job Audits
City of Gainesville, Florida

Evergreen Solutions was engaged with the City of Gainesville to conduct job audits within the Human Resources / Organizational Development Department.

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.

Salary and Benefits Survey
City of St. Cloud, Florida

Evergreen Solutions was retained in 2014 by the City of St. Cloud to conduct a Salary and Benefits Survey. Evergreen's consultants reviewed the effectiveness of the City's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.

Note: Evergreen was also hired in 2007 to conduct a Compensation and Classification Study for the City.

Classification, Compensation and Other Related Services Study
City of Maitland, Florida

Evergreen Solutions was retained by the City of Maitland to conduct a comprehensive evaluation of their compensation and classification plans and practices. Employees participated in the project by attending focus groups, participating in interviews, and completing Job Assessment Tool surveys to determine the accuracy and equity of the classification plan. In addition, pay ranges were analyzed in the public and private sector to determine the competitiveness of the City's pay plan for all included jobs. Recommendations were provided to improve the accuracy, fairness and equity of the overall plan.

Classification and Compensation Study
City of Lake City, Florida

Evergreen Solutions was retained by the City of Lake City to conduct a Classification and Compensation Study. Evergreen's consultants reviewed the City's current classification and compensation plan and identified and recommended a consistent and competitive market position that the City could strive to maintain based on a salary survey results from peer organizations. 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 further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Salary Survey and Job Analysis on Selected Positions
City of Kissimmee, Florida

Evergreen Solutions was hired last year by the City of Kissimmee to conduct a Salary Survey as well as a Job Analysis on selected positions (i.e., Police and Fire). The intent of the study was to compare and contrast the City's current salary structure and levels with those of key competing employers so that a determination could be made regarding the City's competitive position within the marketplace. **Note:** Evergreen also conducted a Salary, Benefits, and Classification Study for the City in 2007.

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.

Human Resource Consulting Services (Compensation Study)
City of Orlando, Florida

Evergreen was retained by the City of Orlando to provide human resources consulting services by conducting a compensation study. Evergreen reviewed the City's compensation system, selected targets and benchmarks for market comparison, conducted a market survey, and developed strategic positioning recommendations to keep the City's compensation plan competitive.

Classification and Compensation Job Classification Analysis
City of St. Petersburg, Florida

Evergreen Solutions was retained by the City of St. Petersburg to conduct a Job Classification Analysis in order to update and produce approximately 648 legally-compliant job descriptions that would include 6 – 8 core competencies each. Evergreen's consultants: analyzed all city job descriptions, both full-time and part-time positions, and determined the core competencies for each classification; and revised classifications and competencies that formed the foundation of the City's recruitment, learning management, performance management, and succession planning programs.

Evergreen met with HR staff and department heads to discuss roles, competency model options, and project processes and adjusted the competency survey that was used in conjunction with the Job Assessment Tool (JAT) that was administered to a representative sample of the City's 3,150 full- and part-time staff. Evergreen reviewed the work performed by each classification and scored and reviewed supervisory comments for any anomalies or discrepancies discovered. Evergreen created task inventory and job families based on JAT responses and organizational charts and identified the degree of overlap in tasks between jobs in similar job families. From this, Evergreen identified root factors in each task grouping and linked to any underlying behavioral factors.

Classification and Compensation Services
City of Dunedin, Florida

Evergreen Solutions was engaged with the City of Dunedin to provide and Classification and Compensation Services. Evergreen analyzed each position within the City by conducting interviews; evaluating employee position descriptions and duties; interviewing department heads; assessing classifications within positions; and making FLSA determinations. Evergreen presented a proposed classification structure to City management, including a cost analysis for positions that would require adjustments. Evergreen also conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, and actual salaries to ensure that the City's compensation was equitable and competitive relative to internal factors and external markets.

Compensation Analysis
City of Orange City, Florida

Evergreen Solutions was engaged with the City of Orange City to conduct a Compensation Analysis. Evergreen's consultants estimated the City's market position, refined pay plan, and slotted incumbents based on data that was collected from the region.

Classification and Compensation Study
City of Ft. Myers, Florida

Evergreen Solutions was retained by the City of Ft. Myers to conduct a Classification and Compensation Study for all employee groups (i.e., Police Union – Sworn only; Fire Union and General Union and Non-bargaining). The study included a comprehensive classification analysis using Evergreen Solutions' Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An evaluation of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations designed to identify and recommend resolution of any inequities in the system and, if necessary, redesign the existing system in place for the City.

Compensation and Classification Study
City of North Port, Florida

Evergreen Solutions was retained by the City of North Port to conduct a Compensation and Classification Study by performing a market study to assess the City's existing compensation and classification plan. The goals for the study were to:

- assess the current compensation and classification structure;
- identify and address internal compensation inequities and recommend adjustments to job titles to better fit assigned duties where necessary;
- review job families/hierarchies throughout the organization;
- support a market-driven compensation plan and system that is designed to incentivize, recognize and retain its employees;
- recommend changes to pay plan and classification structure;
- review the total compensation package (salary plus benefits);
- recommend how to implement tools and techniques to support an ongoing reclassification process that will enable the organization to maintain its competitive place in the market; and
- provide findings and recommendations in a comprehensive report.

Classification and Compensation Study
City of Sarasota, Florida

Evergreen Solutions was retained by the City of Sarasota to conduct a classification and compensation analysis of its workforce. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the 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 system.

Employee Compensation Consultant Services
City of Coral Springs, Florida

Evergreen Solutions was engaged with the City of Coral Springs to provide employee compensation consultant services. The purpose and intent of the study was to compare and contrast the City's current salary structure and levels with those of key competing employers and to determine the City's competitive position within the marketplace. Evergreen analyzed each position within the City by conducting interviews and evaluating position descriptions and duties. Evergreen also interviewed department heads and assessed classifications within positions to determine whether classifications need to be revised. Based on the review, Evergreen recommended pay and classification strategies for the City in order to attract and retain talented employees.

Classification and Compensation Study
City of Sebring, Florida

Evergreen Solutions was hired by the City of Sebring to conduct a Classification and Compensation Study that will allow the city to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants reviewed the effectiveness of the City's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. Evergreen conducted a job analysis for ensuring proper classification and internal equity. Employees participated in focus groups, interviews, and a job analysis was conducted 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 in the current system.

Salary Survey
City of Dania Beach, Florida

Evergreen Solutions was retained by the City of Dania Beach to conduct a salary survey to compare 40 benchmark positions against municipalities of comparable size within the tri-county area, and to make recommendations to improve the competitiveness of the City in recruiting and retaining qualified staff.

Compensation Study
City of Hollywood, Florida

The City Hollywood retained Evergreen to conduct a compensation study of all non-represented employees and then again for AFSCME employees (i.e., approximately 66 Professional and Supervisory employees in 38 different job classifications). A job-task analysis/job audit was conducted to determine whether classifications were correctly placed in the organizational hierarchy and whether individual job positions were classified correctly. Evergreen reviewed job descriptions using the Job Assessment Tool job valuation methodology and conducted a statistical assessment of current conditions to ensure compliance with federal and state laws including proper designation of classifications as "exempt" vs. "non-exempt".

Evergreen conducted a comprehensive survey to ensure that the City of Hollywood's compensation plan was equitable and competitive in its total compensation package relative to internal factors and external markets (The City's goal was to be in the top 25% in salary). Evergreen's consultants reviewed existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed, based upon the results of the salary survey and the recommended pay plan.

Evergreen concluded the study with recommendations designed to alleviate any strains on the current compensation and classification system. Evergreen further recommended procedures, policies, and methods to maintain an on-going Classification & Compensations Plan that was performance based, fair and competitive. In addition, Evergreen's consultants developed policies and procedures for developing and maintaining a career track/progression/retention program and reviewed existing performance appraisal system in order to make recommendations to integrate the performance appraisal system with new Classification & Compensation Plan.

Pay and Classification Study
City of Doral, Florida

Evergreen Solutions was engaged with the City of Doral to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, salaries were analyzed in the public and private sector to determine the appropriate salary for all included jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system. **Note:** Evergreen was also hired in 2007 to conduct a Compensation, Classification, and Value Engineering Study.

Compensation Study
City of North Miami Beach, Florida

Evergreen Solutions was retained by the City of North Miami Beach to conduct a compensation study. Evergreen consultants reviewed pay ranges in the public and private sector to determine the appropriate pay levels for all included jobs (up to 60 benchmarks). Recommendations were provided to improve the fairness and equity within the City. Evergreen provided City staff with the necessary training and materials so that an understanding of the methodology— and how to implement, administer, and maintain the recommended compensation system—was accomplished.

Benchmark Compensation Study
City of Plantation, Florida

Evergreen Solutions was retained by the City of Plantation to conduct a Benchmark Compensation Study and develop a city-wide compensation plan for the City, taking into account internal and external equity. Evergreen developed recommendations and guidelines for the continued administration and maintenance of the compensation structure, including recommendations and guidelines related to how employees will move through the pay structure/system as a result of transfers, promotions, demotions and employees whose base pay is at the maximum of their pay range in their positions; including proposal for the proper mix of pay, how often to adjust pay scales and survey the market, and how to keep the system fair and competitive over time.

Classification and Compensation Study
City of Sunny Isles Beach, Florida

Evergreen Solutions was retained by the City of Sunny Isles Beach to conduct a classification and compensation study for all its employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.

Classification, Compensation, and Benefits Study
Town of Jupiter, Florida

Evergreen Solutions was retained by the Town of Jupiter to conduct a classification, compensation, and benefits study of its workforce. Evergreen's consultants reviewed the effectiveness of the Town's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. Evergreen conducted a job analysis for ensuring proper classification and internal equity. Employees participated in focus groups, interviews, and a job analysis was conducted 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 in the current system.

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

The City of Palm Beach Gardens, located in south Florida, just north of West Palm Beach, entered into a 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.

Job Classification and Compensation Study
City of Sunrise, Florida

Evergreen Solutions is engaged with the City of Sunrise to conduct a Job Classification and Compensation Study of its 1,200 employees. The City is at the geographic center of the tri-county metropolitan area comprised of Miami-Dade, Broward and Palm Beach Counties and has a reputation for strong financial management, aggressive economic development, outstanding police and fire rescue services, leadership on regional issues, and support for its public schools.

Evergreen will conduct a comprehensive evaluation of the City's current classification structure and related policies and practices as well as comparative analysis of position classifications to determine relative work within the organization and for the establishment of appropriate pay grades. Evergreen will work with the City to identify the proposed labor market and benchmark classes and public and private agencies/markets that are similarly situated to the City to include in the salary survey. A comprehensive total compensation and benefits survey will be distributed to comparable peers that not only assess job titles but also accounts for actual corresponding job duties and responsibilities.

Evergreen will further conduct interviews with employees in single position classifications, a representative sample of employees in multiple position classifications, and appropriate management personnel in order to validate the information pertaining to job duties. Information will be obtained from employees through the distribution of a job assessment tool Evergreen will use the information obtained from the JAT to perform a job analysis to verify and validate information with existing job descriptions to determine if classifications are correctly allocated in an organizational hierarchy.

In the end, Evergreen will summarize the methodology, techniques, and data used to develop the proposed compensation and classification plan and will provide recommendations for a classification and compensation structure that reflects the City's overall classification and compensation strategies. Evergreen will further recommend pay grades, grade pricing and salary ranges for all existing and proposed classification.

Compensation and Classification Study
Town of Davie, Florida

Evergreen Solutions is engaged with the Town of Davie to conduct a Compensation and Classification Study. Evergreen will conduct a comparison analysis of all employees within the Town and analyze the job tasks for each position surveyed by best match and benchmark pay ranges to local public sector markets. Evergreen will conduct a review of job classifications for appropriate internal equity and identify functional overlap and efficiencies in departmental structures and relationships. Evergreen will further conduct a job task analysis/job audit of all

employee positions to verify and validate information from existing job descriptions and conduct personal interviews with employees, supervisors, and directors, as needed. Evergreen will identify and designate all high-risk and/or safety-sensitive classifications and include the appropriate pre-employment screening requirements as mandated by federal, state and local statutes.

Evergreen will review existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed. Evergreen will determine if classifications are correctly placed in organizational hierarchy and review whether individual positions are classified correctly. In the end, Evergreen will provide the Town a recommended classification and compensation structure and a system for maintaining the recommended structure. **Note:** This project is nearing completion.

Classification and Compensation Study
City of Cocoa, Florida

Evergreen Solutions was hired by the City of Cocoa, located in Brevard County, to conduct a Classification and Compensation Study for its 444 employees. Evergreen's consultants performed a comprehensive survey of the City's job classifications, pay structures and benefits and provided recommendations to the City for implementation of the proposed changes in order for the City to maintain internal and external equity.
The City's objectives for the study was: to attract and retain qualified workers who will be paid an equitable salary and benefit package; provide fair salaries for all workers of the City; and provide a salary structure that enables the City to maintain a competitive position with other cities and companies within the same geographic area.

The City's current Pay and Classification Plan consisted of four different classifications:

- General Employees: The current pay structure is set up in pay grades with steps (varying in numbers, up to 16 steps).

- Laborers' International Union of North America (LIUNA): These positions consist of 16 different pay grades with established minimum and maximum pay ranges.

- Coastal Florida Police Benevolent Association (PBA): These positions consist of three (3) different pay grades with established minimum and maximum pay ranges.

- International Association of Firefighters (IAFF): These positions consist of two different pay grades with established minimum and maximum pay ranges.

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.

Pay and Classification Study
City of Fort Walton Beach, Florida

Evergreen Solutions was hired by the City of Fort Walton Beach to conduct a Pay and Classification Study for its 320 employees. Evergreen conducted a job-task analysis/job audit of all employee positions to verify and validate information from existing job descriptions and conducted personal interviews with employees, supervisors, and directors to determine whether classifications were correctly placed in organizational hierarchy and if individual positions were classified correctly. Evergreen conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, actual salaries, and benefits information to ensure the City of Fort Walton Beach's compensation was equitable and competitive in its total compensation package relative to internal factors and external markets. Evergreen conducted a comparison of existing benefits with market data and comment.

Evergreen recommended and implemented a classification system that could be utilized by City staff at the conclusion of the project. To accomplish this Evergreen's consultants:

- grouped positions based upon duties performed, knowledge, skills and abilities for the position;

- conducted and analysis that addressed the issue of internal equity;

- recommended the assignment of each classification to a pay grade;

- reviewed current job descriptions and revised/updated as necessary;

- reviewed the City's current assignment of exempt versus non-exempt status as it related to the FLSA and made appropriate recommendations with justification; and

- provided appropriate adjustments to account for regional cost of living variations.

Classification and Compensation Study
Miami Shores Village, Florida

Evergreen was retained by Miami Shores Village to conduct a Classification and Compensation Study for all employees. 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. Recommendations were provided to improve the fairness and equity within the Village.

Compensation and Classification Analysis
Village of Pinecrest, Florida

Evergreen Solutions was hired by the Village of Pinecrest to conduct Classification Reviews and compensation market analysis utilizing Job Assessment Tool responses and salary survey processes. Evergreen Solutions consultants conducted on-site orientation sessions and focus group meetings where employees were informed of the content of the JAT and coordinated with Village representatives to conduct the JAT in a timely manner. The Village also contributed to a list of benchmark classifications and targeted peer organizations for the external market analysis. At the conclusion of the study the Village was presented with revised and formatted Job Descriptions which reflect up-to-date job tasks and requirements as well as recommendations and implementation strategies for addressing internal and external equity. Each classification was also reviewed for FLSA compliance.

Compensation Study
Village of North Palm Beach, Florida

Evergreen Solutions was retained to conduct a compensation study for the Village of North Palm Beach. The study included evaluating private and public labor market, and making recommendations to improve competitiveness in alignment with the Village's strategic goals. Evergreen's recommendations improved the competitiveness of the Village and helped prepare it for future recruitment challenges.

Classification and Compensation Study
Charlotte County, Florida

Evergreen Solutions was retained by Charlotte County to conduct a classification and compensation study for approximately 900 full-time and part-time employees in 250 classification specifications. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. A review of all current classification specifications and job descriptions was made to ensure consistency, compliance with current industry best practices as to form, and compliance with applicable provisions of the Fair Labor Standards Act (FLSA), ADA, PERC (Florida Statute 447.203), and other applicable State and federal laws.

A salary survey was conducted within the appropriate public and private job markets to determine current market pay grade assignment and salary structure commensurate with the job assignment. Evergreen offered criteria for a candidate's or an employee's placement within corresponding zones of the pay range. Recommendations were made for resolving pay compression issues that had been created due to 5 – 6 years of wage freezes compounded by ever-increasing market competitiveness. **Note:** Prior to this study, Evergreen was hired in 2011 by the County to conduct a Market Salary Survey.

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.

Note: Evergreen completed a market survey and compensation analysis update in 2012 and recently conducted a Compensation and Classification study of the Information Technology Services Department.

Salary and Benefits Review
Hernando County, Florida

Evergreen Solutions was retained by Hernando County to conduct a Salary and Benefits Review of its workforce. Evergreen's consultants reviewed the effectiveness of the County's current salary and benefits plan as it related to the market competitiveness for attracting and retaining quality employees. To accomplish this, Evergreen conducted a comprehensive survey of public and private labor market comparables designed to include salary ranges, pay grade factoring system, actual salaries, and benefits (retirement plans, health and dental insurance) information to ensure the County's compensation was equitable and competitive in its total compensation package relative to internal factors and external markets for substantially similar classifications.

Evergreen also conducted a job-task analysis/job audit of all 766 employee positions to verify and validate information from existing job descriptions. Personal interviews with employees, supervisors, and directors were conducted to determine whether classifications were correctly placed in organizational hierarchy and whether individual positions were classified correctly.

Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs and recommendations were provided to improve the fairness and equity in the current system.

Compensation Study
Sarasota County, Florida

Evergreen Solutions was retained by Sarasota County to conduct a Compensation Study. 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 in the current system.

Compensation and Benefits Study
Seminole County, Florida

The Evergreen Solutions Team was hired by Seminole County to assist with a county-wide Compensation and Benefits Study. The study included employees who served in various capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted 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.

Note: Evergreen also conducted two other projects for Seminole County (i.e., Compensation and Classification Study and a Performance Evaluation Study).

Compensation Study
Lake County, Florida

Evergreen Solutions was retained by Lake County to conduct and furnish a comprehensive compensation survey for Lake County government itself, and for select positions at Lake Emergency Medical Services, Inc. Evergreen made recommendations for improvements and modifications to the current compensation and overall pay structure, including number of pay grades, and appropriate pay ranges (minimum, maximum, percentage between grades, etc.). The recommendations also included appropriate salary ranges and midpoints for each job classification and recommendations for ranges that lagged, matched, or led the relevant labor market. Evergreen surveyed the relevant labor market for merit pay practices being used and recommended pay administration practices to include consideration of merit pay, alternative reward strategies, including non-monetary rewards and cost savings/efficiency incentives as may be suitable.

Compensation Study
Osceola County, Florida

Evergreen Solutions was retained by Osceola County to review its compensation system and structure for areas of improvement. The Evergreen team examined current pay plan's organization, market responsiveness, and adaptability. A detailed report was prepared to that summarized findings and recommendations for improvement.

Compensation and Classification Study Services
Monroe County, Florida

Evergreen was retained by Monroe County to conduct a Compensation and Classification Study for 265 non-union employees in 178 classifications as well as 124 union employees in 46 classifications who are represented by the Teamsters bargaining unit. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. Evergreen's consultants compared the County's positions to other similar positions within other County departments to determine the relative value of each position to every other position in the County. Comparisons were made with regard to the actual work being performed and based on the current job description. In addition, positions were compared to other similar positions in other private and public sector organizations throughout the Florida Keys and South Florida. Characteristics such as size of the organization, geographic proximity, economic and budget characteristics, and other appropriate demographic data were taken into consideration when making comparisons. Evergreen's consultants analyzed pay ranges in the public and private sector to determine the appropriate pay and benefit levels for all included jobs.

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

Note: Evergreen was again hired by Monroe County in September of 2016 to implement a minimum Living Wage of $31,200 year/$15.00 an hour (This included a determination of issues with supervisory duties or compression of positions; what needed to be done to fix those issues; cost for County implementation with variable options; and publication of analysis).

Salary Study
Highlands County, Florida

Evergreen Solutions was retained by Highlands County to conduct a Salary Study for its workforce. The primary goal of the study was to ensure that the County maintained a sound process that provided a classification and pay structure that was fair, equitable, and systematic with a compensation plan that was comparable with other governmental jurisdictions as well as the private sector. The County desired a pay program that was fair, equitable, and competitive with both public and private employers in the surrounding geographic market area from which the County recruited, and was supportive of the County's compensation philosophy to be competitive with area markets in order to attract, motivate, and retain quality employees.

Evergreen's consultants evaluated current pay grades (i.e., number of pay grades, including additions, deletions, and/or consolidations) and recommended a strategy for improvements. Evergreen further developed a classification system that facilitated ongoing compensation analysis and reporting and was based on similarly-situated employees, similar skills, qualifications, responsibilities, and pay, using job family groupings and EEO job categories that comported with EEOC guidelines for government employers. Evergreen reviewed position titles (including supervisory/management) and recommended a titling structure which defined consistent levels of responsibility across the County.

Classification and Compensation Study
Pinellas County, Florida

Evergreen Solutions is retained by Pinellas County to conduct a comprehensive classification and compensation study that will include recommendations and suggestions for an implementation and maintenance process that will effectively provide the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study will be to have a credible classification and compensation plan that: allows positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills and abilities to be classified appropriately; identifies salaries for assigned duties; outlines promotional opportunities and possible compensation growth; identifies pay differential between individual classifications; and identifies relevant labor markets. **Note:** This project is nearing completion.

Classification and Compensation Study
City of Douglasville, Georgia

Evergreen Solutions was retained by the City of Douglasville to conduct a Classification and Compensation Study and Analysis of its workforce consisting of 225 full-time employees in approximately 96 job titles.

Evergreen performed the following tasks:

- Evaluated the City's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors.

- Reviewed all current job descriptions and analyzed same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); and special requirements including licensing and certifications.

- Reviewed the City's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments.

- Analyzed all existing job family classifications, pay grades and salary ranges and recommended modifications as necessary.

- Analyzed all existing FLSA classifications and recommended modifications as necessary.

- Identified potential pay compression issues and provided alternative solutions.

Compensation Analysis
City of Alpharetta, Georgia

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers— both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of this 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.

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.

Employee Classification and Compensation Study
City of Savannah, Georgia

Evergreen was engaged with the City of Savannah to conduct an Employee Classification and Compensation Study for its workforce of 2,500 employees. Evergreen developed a comprehensive job classification system that accommodated the City's need for a flexible, internally and externally equitable, defensible, market sensitive and easily administered system for all current and future jobs within the City. Evergreen established career paths for occupations, provide clear distinctions in different job levels, established performance standards/job qualifications for all newly created job classifications, produced job descriptions that were legally defensible and are in accordance with ADA and FLSA, assigned classifications to pay ranges designed by the City that were labor market appropriate, and trained Human Resource staff so that they could maintain, enhance, and use the classification system to identify and consistently apply the system to modify an existing position or classification or create a new position or classification scheme.

Evergreen further assisted the City in formulating a formal compensation philosophy and developing a compensation system for all job classifications based upon the adopted compensation philosophy. Evergreen identified comparable benchmark employers to guide the City's future employee salary and benefit decisions in order to facilitate the retention and attraction of high performing staff members, while being financially sustainable.

Comprehensive Classification and Compensation Study
City of Garden City, Georgia

Evergreen Solutions was retained by the City of Garden City to conduct a Comprehensive Classification and Compensation Study for its workforce. The primary objectives of the Classification and Compensation Study were to: attract and retain qualified workers who would be paid equitable salaries; provide fair salaries for all workers of the City; and provide a salary structure that enabled the City to maintain a competitive position with other cities and companies within the same geographic area. To accomplish this, Evergreen: worked with the City's management staff to identify a market position for the City; developed a comprehensive labor market salary survey for the Chatham County area and surrounding municipalities that reflected both cities and private industry; analyzed existing internal hierarchy based on job relationships, identified problem areas within the internal hierarch system, and proposed implementation methods to correct identified problems; reviewed current classification grade methodology, and proposed recommended strategies for the City of Garden City; and developed a pay plan identifying specific parameters (i.e., percent spreads between ranges and within ranges). In the end, Evergreen prepared a cost analysis for positions that fell below the proposed minimum salaries following reclassification and developed recommendations and an instrument for the ongoing internal administration and maintenance of the proposed classification/compensation plan.

Comprehensive Classification and Compensation Study
City of Tybee Island, Georgia

Evergreen Solutions was retained by the City of Tybee Island to conduct a Comprehensive Compensation and Classification Study. Evergreen's consultants reviewed the City's current compensation plan (salary grade levels and steps) to understand the current challenges of recruiting and retaining employees and identified and recommended a consistent and competitive market position that the City could strive to maintain based on a salary survey of both private and public sector peer organizations. In the end, Evergreen recommended an appropriate salary range for each position in the City based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity.

Evergreen prepared a new salary structure based on results of the salary survey and best practices and developed guidelines to assist the City staff with determining the starting pay for new employees based on knowledge and experience above minimum requirements of the position, how difficult the position is to fill, and market competitiveness. Evergreen further provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Salary and Benefits Survey
City of Roswell, Georgia

Evergreen Solutions was retained by the City of Roswell to conduct a Salary and Benefits Survey. Evergreen examined wages and benefits of the City's employees as compared to public and private sector entities in Georgia and surrounding areas to determine whether the City's wages and benefits were competitive in the market.

Compensation Study
City of Statesboro, Georgia

Evergreen Solutions was engaged with the City of Statesboro to review and update the City's Classification and Compensation Plan for its 300 employees. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed positions based on the classification study and the compensation survey results.

Classification and Compensation Plan Development
City of Brookhaven, Georgia

Evergreen Solutions was engaged with the City of Brookhaven to develop a Classification and Compensation Plan. The primary goals of this project was to: ensure job descriptions accurately reflect work performed; identify career ladders/promotional opportunities for each classification; determine the City's competitive position within the marketplace; determine the relative value and competitive positioning of each compensation area; and identify any weaknesses within the components of the City's existing compensation plan that may negatively impact the organization's ability to attract and retain talented employees. Evergreen recommended appropriate salary ranges for existing or proposed

positions based on the classification study and the compensation survey results. Evergreen also recommended a performance management and evaluation program, including a comprehensive evaluation form and rating system for fiscal year 2016 implementation. The evaluation plan included a performance based component.

Compensation and Benefits Study
Forsyth County, Georgia

Evergreen Solutions was hired by 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 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 would align with the results of the study.

Evergreen provided recommendations to the overall classification, compensation, and performance plan that provided internal equity and would be competitive in the marketplace to attract and retain qualified employees. Evergreen provided options on ways to keep the pay structure current in future years in order to avoid compression and provided the

necessary training for the implementation of the new salary schedules and plans. Evergreen provided the County with multiple pay scales for both part- and fulltime employees, including pay scales for employees of the Sheriff's Office and Emergency Services.

Classification and Compensation Study and Analysis
Douglas County, Georgia

Evergreen Solutions is engaged with Douglas County to conduct a Classification and Compensation Study and Analysis. Evergreen will evaluate the County's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors. Evergreen will perform the following tasks:

- review all current job descriptions and analyze same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions & summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); special requirements including licensing and certifications;

- review the County's current Position Classification and Wage Administration Plans and provide 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;

- analyze all existing job family classifications, pay grades and salary ranges and recommend modifications as necessary;

- analyze all existing FLSA classifications and recommend modifications as necessary;

- establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions with comparable Georgia counties as required;

- identify potential pay compression issues and provide alternative solutions; and

- develop applicable classification/reclassification questionnaire.

Note: This project is nearing completion.

Salary Plan Review
City of Suffolk, Virginia

Evergreen Solutions was retained by the City of Suffolk in 2015 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 was previously hired by the City of Suffolk to conduct a Compensation and Classification Study.

Pay and Classification Study
City of Williamsburg, Virginia

Evergreen Solutions was retained by the City of Williamsburg to conduct a Pay and Classification Study. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the marketplace to determine the appropriate pay levels for all jobs. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.

Classification and Compensation Study
City of Fredericksburg, Virginia

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Classification and Compensation Study. Evergreen conducted a full job analysis of City positions and revised existing job descriptions based upon the findings of the job analysis. Evergreen also surveyed the local labor market to ensure that the City's overall package of compensation and benefits was competitive and evaluated whether the City's current human resources policies was affecting the City's ability to compete in the labor marketplace.

Evergreen assisted the City in updating its current classification and compensation plan and developed a strategy to increase employees' pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations to the overall classification and compensation plan that provided internal equity and that would be competitive in the marketplace to attract and retain qualified employees.

Classification and Compensation Study
County of Culpeper, Virginia

Culpeper County retained Evergreen Solutions to assist with a comprehensive classification and compensation study of all its employees. Evergreen's consultants conducted 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 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.

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.

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. **Note:** This project is nearing completion as a draft final report has been submitted for review and approval.

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 members were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.

Comprehensive Position Classification and Compensation Study
Gaston County, North Carolina

Evergreen Solutions was engaged with Gaston County to conduct a Comprehensive Position Classification and Compensation Study for its employees (1,410 full-time, 46 part-time, and 143 temporary). The primary objective of the study was to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allowed the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen's consultants performed a comprehensive review of the County's classification and compensation system which included conducting an internal equity analysis of employee salaries.

Evergreen provided recommendations to create a system that not only aligned with the State of North Carolina's substantially equivalency requirement, but allowed for flexibility so as not to inhibit those departments that were not required to have this alignment.

Classification and Compensation Study
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.

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.

Classification and Compensation Study
Town of Mount Pleasant, South Carolina

Evergreen Solutions was hired in 2011 to assist the Town of Mount Pleasant to assist with a Compensation and Classification Study. The Evergreen Team conducted employee orientation sessions, focus groups, job analysis, market assessment, and provided recommendations.

Evergreen was again hired in the later part of 2015 to conduct a Wage and Compensation Study and Benefits Survey. The purpose of the study was to evaluate the Town's present wage and compensation plan, as well as its benefit package against those of comparable municipalities and competitive businesses, analyze and amend job descriptions, and develop a recommendation for improving the Town's current performance evaluation process and the forms used in this process. Attention was paid to private employers that competed for similar, qualified employees in the labor markets comparable to the Town. Evergreen is providing ongoing support with regard to salary classification and creation of job descriptions for new positions as they occur, and reclassification of current positions when requested.

Classification and Compensation Study
Town of Hilton Head Island, South Carolina

Evergreen Solutions was engaged with the Town of Hilton Head Island to conduct a Classification and Compensation Study for all its employees. The study included the following primary objectives: to conduct a thorough, complete and accurate class specifications/job descriptions for all positions; appropriate valuation of each position relative to other Town positions; and to develop a competitive total rewards package (salary and benefits) relative to similar positions in the market.

Evergreen provided written guidelines for maintaining class specifications/job descriptions, for evaluating/re-evaluating job class specifications/job descriptions and for maintaining model compensation structure (s). Evergreen further recommended pay administration policies to include, but not be limited to, policies regarding movement through ranges, adjustments within pay grades, adjustments for assumption of additional duties (temporary or permanent), reclassifications, promotions, transfers, demotions, career ladders, etc. and recommended reliable external market data sources for salary structure adjustments and determination of merit budget

Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future

merit allocation approaches, considering changes to classification and compensation program and limited budgets.

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. **Note:** This project is nearing completion.

Classification and Compensation Study
Sedgwick County, Kansas

Evergreen Solutions was retained by Sedgwick County to conduct classification and compensation study for approximately 2,766 employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs.

Recommendations were provided to improve the fairness and equity within the County and a plan was provided to address maintenance of implemented changes to the County's classification and compensation system. In addition, Evergreen provided County staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system would be accomplished.

Classification and Compensation Study
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 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.

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 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.

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.

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 play plan; and verified the internal equity of the new pay plan.

Human Resources Department Assessment (Classification and Compensation Services)
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 the 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.

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.

Employee Compensation Consulting Services
Ft. 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.

Classification Study and Compensation Survey
City of Page, Arizona

Evergreen Solutions was engaged with the City of Page to conduct a Classification Study and a Compensation Survey for all employees. As part of the study, Evergreen conducted orientation sessions, focus groups, and interviews. Employees completed a Job Assessment Tool (JAT) in order to analyze job duties and revise the current classification structure. A salary and benefits survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures was recommended to the City.

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.

Salary and Benefits Study
City of Carlsbad, New Mexico

Evergreen Solutions was retained by the City of Carlsbad to conduct a Salary and Benefits Survey. The study included the evaluation of 50 union 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 used private sector data from ERI for data that was unavailable from selected targets using a custom salary survey. In addition, Evergreen collected average actual salary data for the benchmarked positions. Evergreen's recommendations improved the competitiveness of the City and helped prepare the City for future recruitment challenges.

1.3 Proposed Project Team

Exhibit 1-2 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 Total Rewards Study for the City of Gainesville so that there will be no confusion as to who is responsible for any aspect of this engagement. **Note:** Evergreen will not be utilizing any subcontractors for this study.

**Exhibit 1-2
Proposed Project
Management
Organization and
Personnel
Assignments**

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│   CITY OF GAINESVILLE, FL    │
│       Project Manager       │
│                             │
│      to be determined       │
└─────────────────────────────┘
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┌─────────────────────────────┐
│     EVERGREEN SOLUTIONS      │
│       Project Principal      │
│                             │
│        Dr. Jeff Ling        │
└─────────────────────────────┘
              │
┌─────────────────────────────┐
│     EVERGREEN SOLUTIONS      │
│       Project Director       │
│                             │
│ Ms. Queenell Fox, SHRM-SCP, IMPA- │
│         SCP, SPHR           │
└─────────────────────────────┘
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│     EVERGREEN SOLUTIONS      │
│     Project Consultants      │
│                             │
│      Mr. Lee Bouchelle       │
│      Mr. Andrew Gillen       │
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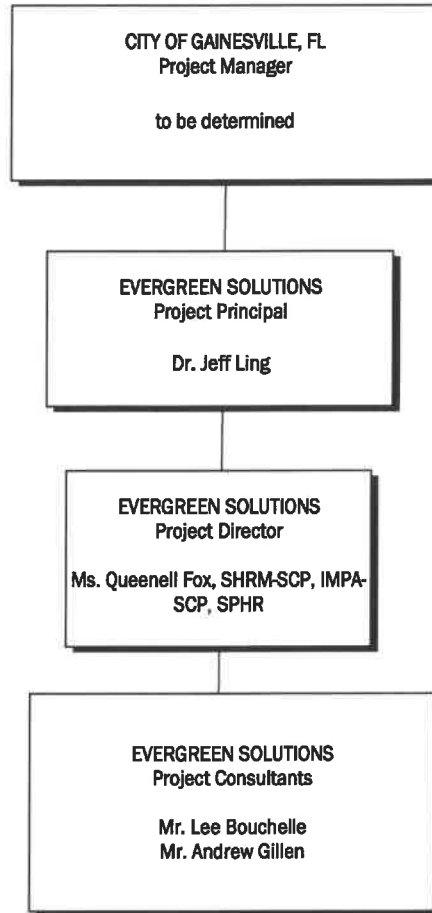
City of Gainesville Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The City's Project Manager will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the City's Project Manager and all project deliverables will be filtered through the City's Project Manager throughout the duration of the project.

Evergreen Solutions Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, 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 a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the City's Project Manager. The Project Director will have the most frequent contact with the City and will assign project activities to the Project Consultants, and will ensure that deliverables are met within specified timelines.

Evergreen Solutions Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will distribute and collect the data for the salary, benefits, and work life effectiveness survey, and prepare draft materials for the Project Principal and Project Director to review.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Evergreen is proposing an exceptional team of consultants who have worked together on many similar projects. Evergreen Solutions always makes sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Total Rewards Study for the City of Gainesville.

Key Staff

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

Project Principal
Dr. Jeff Ling, CCP

Dr. Ling is Executive Vice-President of Evergreen Solutions and has been with the firm since its inception. He is a Certified Compensation Professional (CCP) with more than 25 years of 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 compensation and/or classification. Some of the public sector clients that he has worked with, or is currently on contract to work with, include: City of Gainesville, FL; City of High Springs, FL; City of Holly Hill, FL; City of Ocala, FL; City of Kissimmee, FL; City of Lake City, FL; City of Plant City, FL; City of Orange City, FL; City of Ft. Myers, FL; City of Cape Coral, FL; City of Dania Beach, FL; City of St. Cloud, FL; City of Daytona Beach, FL; City of St. Petersburg, FL: City of Dunedin, FL; City of Cocoa, FL; City of Bartow, FL; City of Sebring, FL; City of Palm Beach Gardens, FL; City of Winter Park, FL; City of Panama City, FL; City of Clermont, FL; City of Hollywood, FL; City of North Port, FL; City of Orlando, FL; City of Sunrise, FL; City of Coral Springs, FL; City of Key West, FL; City of Bushnell, FL; City of Sarasota, FL; City of Tamarac, FL; Town of Jupiter, FL; Town of Cutler Bay, FL; Town of Davie, FL; Miami Shores Village; Alachua County, FL; Manatee County, FL; Charlotte County, FL; Monroe County, FL; Osceola County, FL; Pinellas County, FL; Miami-Dade County, FL; Seminole County, FL; Hernando County, FL; Sarasota County, FL; Forsyth County, GA; Lumpkin County, GA: City of Kingsland, GA; City of Alpharetta, GA; City of Douglasville, GA; City of Roswell, GA; City of Brookhaven, GA; City of Savannah, GA; Sedgwick County, KS; City of Kalamazoo, MI; City of Bloomington, IN; City of Branson, MO; City of Lee's Summit, MO; Clay County, MO; Jefferson County, MO; St. Charles County, MO; City of Pittsburg, PA; County of Montgomery, PA; County of Allegheny, PA; Mahoning County, OH; Blount County, TN; City of Austin, TX; City of Pearland, TX; City of Sunset Valley, TX; City of Rowlett, TX; City of Seguin, TX; Denton County, TX; Travis County, TX; Ft. Bend County, TX; City of Santa Fe, NM; City of Carlsbad, NM; City of Page, AZ; Town of Sahuarita AZ; Gloucester County, VA; Essex County, VA; James City County, VA; County of Culpeper, VA; Isle of Wight County, VA; City of Fredericksburg, VA; City of Williamsburg, VA; City of Suffolk, VA; Spotsylvania County, VA; Loudoun County, VA; King George County, VA; Gaston County NC; Guilford County, NC; Berkeley County, SC; Charleston County, SC; City of Columbia, SC; City of Lancaster, SC; City of Mauldin, SC; City of Chester, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; Town of Moncks Corner, SC; Tri-County Council for Southern Maryland; Allegany County, MD; City of Westminster, MD; City of Annapolis, MD; City of Hyattsville, MD; 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. Some of the public organizations he has provided these services to include, but are not limited to, the following: City of Cape Coral, FL; City of Hollywood, FL; Seminole County, FL; Manatee County, FL; Brunswick County, NC; City of Lee's Summit, MO; and City of Mont Belvieu, TX.

- Market Research – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically

reliable using his knowledge of statistics and overall market research.

- Policy Development – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.

**Project Director
Ms. Queenell Fox,
SHRM-SCP, IMPA-
SCP, SPHR**

Ms. Fox, SHRM-SCP, IMPA-SCP, SPHR, is a Manager with Evergreen. She is an executive human resources professional with a proven track record of success in achieving organizational objectives by utilizing strategic HR initiatives to meet organizational needs. She has demonstrated strong communications, interpersonal relations, coaching, counseling and conflict resolution skills and a thorough knowledge of employment laws, regulations and HR best practices. Her expertise falls into the following HR areas: organizational development and change; classification and compensation; employee relations; recruitment and retention; benefits administration/negotiations; union/civil service and labor relations; policy creation/implementation; succession planning; training and professional development; performance management; budget administration; and HRIS management and leadership.

Prior to Evergreen, Ms. Fox was the Director of Human Resources for the City of League City in Texas where she was a trusted member and advisor to the City's Executive Team, Mayor and City Council and employees which resulted in substantial, positive organizational changes to the City by developing, implementing, promoting, and sustaining a culture of continuous improvement, high professional ethics, collaboration, compliance, and commitment. As the Director of HR for the City, she accomplished the following:

- revised and updated employee handbook to ensure current laws and best practices were incorporated and to ensure legal compliance and best practices were in place for a growing City;

- restructured hiring and recruiting processes to ensure updated job descriptions, salary analysis and department's budget allocations were in place prior job vacancy recruiting;

- streamlined and organized scanning of personnel files and documents into the document storage system, Laserfische;

- forged a trusted and collaborative working relationship with Chief and Assistant Chief of Police and other members of the department to revise and update Local Rules, successful mediations and ongoing efforts to bring about positive change to the department;

- established a great working relationship with long tenured managers and to find resolutions to staffing and employee relations challenges;

- revamped and modified annual evaluation system to ensure ongoing performance conversations, corrective actions or accolades take place all year long to support effective performance reviews; and

- negotiated benefits and windstorm and hail consulting contracts that provided the City with better coverage and a reduced cost in premiums.

From 2008 to 2013, Ms. Fox was a Chief Personnel Resource Management Officer for the Florida Department of Management Services (DMS). In this capacity, she served as the organization's top human resources manager responsible for guiding and leading the human resources services, policies, and programs for the organization. Services included: Employee Relations, Classification & Pay; Organizational Development and Realignment; Succession Planning, Recruitment and Staffing; Benefits Administration; Development and Training; Federal and State Compliance; Policy Development and Legislative Rule Interpretation, HRIS, Human Resources Strategic and Tactical Plans; Workforce Planning; Internal and External Customer Relations, and Budget.

Prior to working with DMS, Ms. Fox served as the Director of Human Resources for the FSU Foundation, Inc., from 1996 to 2008. While there, she administered and maintained a comprehensive human resources program that included the day-to-day administration and the development of personnel policies and procedures. She developed long- and short-term strategic goals to ensure challenges and opportunities of the origination were met and she managed department personnel and budget to assure goals and objectives were achieved. She also collaborated with all levels of management and external customers to develop creative initiatives designed to enhance recruitment, development and retention of a quality work force and resolved employee relations issues. She routinely mentored, and approved mangers' disciplinary actions and involuntary terminations to ensure equity and compliance.

Recent public sector projects that Ms. Fox has directed or served on the Evergreen Team include: Implementation of a Living Wage for Monroe County, FL; a Classification Study for the City of High Springs, FL; a Compensation Analysis for the City of Orange City, FL; a Pay and Classification Study for the City of Holly Hill, FL; an Efficiency Study of the Clerk's Office for the City of Pensacola, FL; a Job Classification and Compensation Study for Escambia County, FL; a Salary and Benefits Study for the Seacoast Utility Authority, FL; a Classification and Compensation Study for the Sarasota Bay Estuary Program, FL; a Compensation and Classification Study for Clay County, MO; an Employee Compensation and Classification Study for Mahoning County, OH; a Classification and Compensation Study for Greensville County and Greensville County Water and Sewer Authority, VA; a Classification and Compensation Study or Surry County and Surry County Social Services, VA; a Compensation and Classification Study for Prince George County, VA; a Pay and Classification Study for Dorchester County, SC; Classification

and Compensation Study and Analysis for the Town of Cheraw, SC; a Salary Comparability Study for the Housing Authority of Florence, SC; a Job Classification and Compensation Study for the City of Salem, OR; a Classification and Compensation Study for the City of Athens, TX; a Classification and Compensation Study for the City of Gonzales, TX; Classification and Compensation Plan Update (Included Review of Performance Appraisal System) for the City of Temple, TX; and a Comprehensive Classification and Compensation Analysis for the Barton Springs/Edwards Aquifer Conservation District, TX.

Ms. Fox has a Bachelor's Degree in Human Resource Management and MBA coursework from Columbia University. She is a certified Senior Professional in Human Resources (SPHR), Senior Certified Professional with the Society for Human Resources Management (SHRM-SCP) and as a Senior Certified Professional with the International Public Management Association (IPMA-SCP). She is also a certified Professional in Human Resource Management (PHR).

Project Consultant
Mr. Lee Bouchelle

Mr. Bouchelle is a Consultant at Evergreen Solutions. He has a strong background in Applied Labor Economics and quantitative analysis, which provides him with the ability to provide knowledge on a variety of public sector Human Resource studies. His research and data analysis skills at Evergreen have focused on human resource analysis, such as studying the internal equity of employee compensation and classification for public sector clients as well as comparing client practices to peers in the labor market. He is proficient in a variety of qualitative and quantitative tools necessary to complete the studies.

Recent public sector projects for Evergreen in which Mr. Bouchelle has been involved include: a Classification and Compensation Study for the City of High Springs, FL; a Classification and Compensation Study for the City of Delray Beach, FL; a Compensation and Classification Study for Alachua County, FL; a Job Classification and Compensation Study for the City of Sunrise, FL; a Compensation and Classification Study for the City of North Port, FL; a Compensation and Job Grading Analysis for the Jacksonville Aviation Authority, FL; a Pay and Classification Study for the City of Holly Hill, FL; Compensation Consulting Services for the Town of Longboat Key, FL; FLSA Audits for the Southwest Florida Water Management District; a Classification and Compensation Study for the City of Destin, FL; a Compensation Plan Update for the City of Garden City, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Classification and Compensation Study for Lumpkin County, GA; and an Employee Classification and Compensation Study for the City of Savannah, GA; a Pay and Classification Study for the City of Chamblee, GA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Classification and Compensation Study for the City of Fredericksburg, VA; a Pay and Classification for the City of Williamsburg, VA; a Pay and Classification Study for the District 19 Community Services Board, VA; Classification and Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; a Position Classification and Compensation Study for Gaston County, NC; a Classification and Compensation Study for Berkeley County, SC; a Classification and Compensation Study for Dorchester County, SC; a Pay and Classification Study for the Town of Moncks Corner, SC; Salary Comparability Study for the Housing Authority of Florence, SC; a Compensation Update for the Central Ohio

Transit Authority; an Employee Classification and Compensation Study for Blount County, TN; a Classification and Compensation Study for Jefferson County, MO; a Compensation and Classification Study for Clay County, MO; a Human Resources Department Assessment for the City of Buda, TX; a Classification and Compensation Study for the City of Athens, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; and a Classification Study and a Compensation Survey for the City of Page, AZ.

Prior to joining Evergreen Solutions, Mr. Bouchelle was a Consultant at ERS Group, where he was involved in the development of large and complex economic and statistical research projects which analyzed the effects of various business practices or economic programs. He also participated in data analytics projects that sought to identify fraud, waste, and abuse in the healthcare industry and state income tax filings. In addition, he prepared OFCCP compliant Affirmative Action Plans, evaluated AAP software for statistical accuracy, and estimated economic damages from various events.

Mr. Bouchelle has a Master's Degree in Resource Economics and a Bachelor's Degree in Political Science/International Relations both from the University of Florida.

Project Consultant Mr. Andrew Gillen

Mr. Gillen is an Analyst at Evergreen Solutions. His background has been in the study of compensation practice, labor law, and strategic management using techniques in data analytics and financial management.

Mr. Gillen's role with Evergreen has focused on classification and compensation 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. Gillen has been involved with include: a Pay and Classification Study for the City of Doral, FL; a Compensation Study for the City of Sebring, FL; a Pay and Classification Study for Gulf County, FL; a Pay and Classification Study for Martin County, FL; a Pay and Classification Study for the City of Marathon, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Classification and Compensation Study for the City of Sarasota, FL; a Classification and Compensation Study for the City of Fort Myers, FL; an Employee Engagement Survey Study for the City of Daytona Beach, FL;

a Compensation Pay Plan Study for the City of Plant City, FL; a Human Resources Consulting Services Study for the City of Orlando, FL; a Classification and Compensation Study for Sarasota Bay Estuary Program, FL; a Job Classification and Compensation Study for Escambia County, FL; a Compensation Analysis Study for the City of Orange City, FL; a Job Classification and Compensation Study for the City of Sunrise, FL; an Employee Classification and Compensation Study for the Florida Association of Court Clerks and Comptrollers; a Compensation Study for Palm Beach State College, FL; a Salary and Benefits Survey Study for Seacoast Utility Authority, FL; a Classification and Compensation Study for the Town of Davie, FL; a Compensation Study for Manatee County Clerk's Office, FL; a Performance Audit Study for the City of Pensacola, FL; a Pay and Classification Study for Brevard County Property Appraiser, FL; a Classification and Compensation Study for the City of High Springs, FL; a Compensation Study for CareerSource Northeast Florida; a Classification, Compensation, and Benefits Study for Spotsylvania County and Spotsylvania County Public Schools, VA; a Classification and Compensation Study for Loudoun County, VA; a Classification and Compensation Study for the Rivanna Water and Sewer Authority and the Rivanna Solid Waste Authority, VA; a Classification and Compensation Study for James City County, VA; a Compensation Study for York County, VA; a Comprehensive Market Assessment Study for Charleston County, SC; a Classification and Compensation Study for the Town of Summerville, SC; a Classification and Compensation Study for Mahoning County, OH; a Salary and Benefits Study for the City of Bloomington, IN; a Classification and Compensation Study for the City of Broken Arrow, OK; a Classification and Compensation Plan Update Study for the City of Temple, TX; a Comprehensive Compensation and Benefits Study for the City of Sachse, TX; a Pay and Classification Study for the City of Fredericksburg, TX; a Classification and Compensation Study for the City of Gonzales, TX; and a Classification and Compensation Study for the City of Salem, OR.

Mr. Gillen holds a Bachelor of Science Degree in Business Administration with a focus in Human Resource Management from the AACSB-accredited Shippensburg University of Pennsylvania.

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

1.4
References

As required in the Request for Proposal (RFP), we have provided the following three references that we feel demonstrate the breadth and quality of the work our team has performed for similarly situated operations (i.e., over 1500 employees) 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.

Compensation and Classification Study
Alachua County, Florida
Contact Information: Karen Gerding, PHR, CPM, Acting Human Resources Director, P.O. Box 5697, Gainesville, Florida 32627, (352) 374-5219, Kpg@alachuacounty.us

Human Resource Consulting Services (Compensation Study)
City of Orlando, Florida
Contact Information: Ana Palentuela, Compensation and Benefits Manager, (407) 246-2235, anapalentuela@cityoforlando.net

Compensation Study
City of Hollywood, Florida
Contact Information: Tami Thornton, HR Administrator, 2600 Hollywood Boulevard, Hollywood, Florida 33020, (954) 921-3216, tthornton@hollywoodfl.org

1.5
Resources Needed from City Staff

Evergreen will look to the City's staff for assistance throughout the duration of the project; however, we suspect the most time that we will need staff involvement will occur near the initial commencement of work and will be fairly minimal. Evergreen Solutions will request that a Project Manager be designated by the City to serve as our central point of contact. The Project Manager will have the most frequent interaction and involvement with Evergreen's consultant team.

Some of the functions we anticipate needing assistance from City staff include:

- providing requested data and documents;

- meeting in-person with our consulting team when they are on-site in Gainesville;

- facilitating components of the project communication plan—such as notifying employees about the study, updates of study progress and final study recommendations;

- reviewing interim deliverables and providing feedback; and

- assisting in the resolution of any study issues.

While the initial data collection will represent the majority of the staff time that would be requested by Evergreen Solutions, we anticipate that overall staff time dedicated to the project will be minor—approximately three percent or less of total project hours.

In addition, Evergreen Solutions values feedback and will look to the City's Project Manager and other decision makers for guidance at different milestones throughout the project. These milestones will be clearly communicated and agreed upon by Evergreen's Project Director and the City's Project Manager.

Based on our experience conducting this type of study, we will request the following types of data and documents to assist our consultant team with the employee compensation study:

- policies and administrative procedures;
- organizational charts;
- program and compliance reports;
- current pay and classification plan;
- current job descriptions;
- schedule of current salary ranges;
- current pay grade and annual salaries; and
- other documentation that will assist in completing this study.

Evergreen consultants will bring their own computers and cell phones, and we will not require technical expertise from City staff.

1.6 What Our Clients Are Saying

The following quotes were taken from some of our public sector clients as they relate to the human resource work we have performed:

"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 exceeded our expectations."

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

"Evergreen's staff was professional and responsive."

"Evergreen was willing to incorporate changes throughout the process to make the final product the best it could be!"

"Evergreen provided different options that allowed the City to best assess what it could afford."

Andy McNeill, HR/Risk Manager
City of Orange City, FL

"Great staff, willingness to jump right in and help, and willingness to meet short turnaround time expectations all provided to a positive overall experience."

Ed Sisson, HR Director
City of Pensacola, FL

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

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

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

Stacie Mason, Human Resources Director
City of Sarasota, FL

"Evergreen's Project Director was very accessible."

Jerry Haines, Human Resources Manager
Hernando County, FL

"Evergreen's Project Director was extremely accessible and very responsive."

Robin Hudson, Director of Human Resources
St. Johns River Water Management District, FL

"Evergreen's Project Director was extremely accommodating. We were very satisfied."

Teresa Aguiar, Employee Services Director
Monroe County, FL

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

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

"Final product was outstanding."

Randy Swing, President
Association for Institutional Research, 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

"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

"The Evergreen Team was awesome in their service of the contract."

"The Project Director's style was one that listens and understands, but also one who is an expert in compensation and classification issues in local government."

"The Evergreen Team was on time, accurate, and consistent with our organization's goals. When faced with questions or challenges, the Evergreen Team was quick to offer suggestions and viable ideas for addressing them successfully."

Nancy Olivo, Director of Human Resources
City of Suffolk, VA

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

Pam Smith, Human Resources Director
Essex County, VA

"Very impressed with the Project Team"

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

"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

"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

Section 2
Approach and Work Plan

2.0 Approach and Work Plan

In this section we provide our understanding of the statement 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 deliverables included in the scope of services of the Request for Proposal (RFP)—and a proposed timeline. We have also included any potential challenges that may occur.

2.1 Understanding of Scope

Evergreen understands that according to the scope of services of the Request for Proposal that the City of Gainesville wants to hire a consultant to conduct a Total Rewards Study that includes pay, benefits and work/life effectiveness. The goal of the study is to design a Total Rewards Program which would position the City of Gainesville as an Employer of Choice, in attracting, motivating, and retaining talent, to support our journey in becoming the New American City.

2.2 Evergreen's Approach

Evergreen Solutions is uniquely qualified to conduct a Total Rewards Study for the City of Gainesville as our team includes recognized experts in local government human resources management and understands that there is not a "one size fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;

- is based on the organization's compensation philosophy;

- recognizes that compensation is comprised of more than just base pay levels;

- reflects changes in recent compensation strategies;

- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and

- produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the City's designated Project Manager and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes.

We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen 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 Evergreen Solutions begins each engagement by meeting with our client's leadership team as well as the person designated as the Project Manager for the client. Frequently, this initial meeting will accomplish several goals, including:

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the management structure and approach;
- collecting compensation and benefits data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

We will also request a copy of the employee database that reflects current classification and compensation data.

Communication Plan Communication is a critical component of any total rewards study. Communicating with select 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. Regular updates will be provided to the client's Project Manager and can be posted on the client's intranet site, if desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

Developing the Compensation Philosophy	An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen Solutions will meet with the client's leadership team to ascertain the organization's overall business strategy and document the various alternatives that are available to support that strategy. Based on the client's needs, Evergreen Solutions will provide the client with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It is imperative for the client to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.
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 compensation philosophy. |
| **Market and Benefits 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 look to include any employers to whom the organization has recently lost employees.

In addition, a benefits survey will also be administered in tandem with the market survey. Special consideration can be given to select highly competitive, market-driven positions if necessary. |
| **Benchmarks** | One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best fit their needs in the labor market survey. |

Based on our experience, we have found that it is simply not practical to survey all positions within the organization– the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets

To conduct an external labor market assessment, we work with the organization to identify the most appropriate targets to survey. Evergreen Solutions 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. Peers in the public sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen Solutions waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

Evergreen 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.

Compensation Administration Guidelines

In order for clients to maintain the recommended compensation system, Evergreen Solutions 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.

2.3 Detailed Work Plan

Evergreen has provided a detailed work plan to conduct the Total Rewards Study for the City of Gainesville in this section.

Our work plan consists of the following eight tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Identify List of Market Survey Benchmarks and Approved List of Targets
- Task 4: Conduct Market Survey and Provide External Assessment Summary
- Task 5: Conduct a Benefits Survey
- Task 6: Develop Strategic Positioning Recommendations
- Task 7: Develop and Submit Draft and Final Reports
- Task 8: Develop Recommendations for Compensation Administration

Task 1.0 Project Initiation

TASK GOALS

- Finalize the project plan with the City of Gainesville (City).

- Gather all pertinent data.

- Finalize any remaining contractual negotiations.

- Establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

1.1 Discuss with the City's Project Manager (CPM) and Human Resources staff the following objectives:

- understand the mission and current compensation philosophy for the City;

- identify and specific concerns with respect to the development of a compensation plan;

- review our proposed methodology, approach, and project work plan to identify any necessary revisions and to assess any concerns;

- reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and

- establish an agreeable communication schedule.

1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the City and some of the short- and long-term priorities. This activity serves as the basis for assessing where the City is going and what type of pay plan will reinforce current and future goals.

1.3 Obtain relevant materials, including:

- any previous projects, research, evaluations, or other studies that may be relevant to this project;

- organizational charts for the departments and divisions, along with related responsibility descriptions;

- current position and classification descriptions and salary schedule(s);

- benefits information;

- budget information; and

- policies and procedures.

1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.

1.5 Provide status updates throughout the course of the project.

KEY PROJECT MILESTONES

- Comprehensive project management plan

- Comprehensive database of City employees

**Task 2.0
Evaluate the
Current System**

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation plan for of the City.

TASK ACTIVITIES

2.1 Obtain the existing pay structure and compensation philosophy for the City. Look for potential problems to be resolved.

2.2　Determine the strengths and weaknesses of the current pay plans for the City and review current pay grades and identify any pay compression issues.

2.3　Complete an assessment of current conditions that details the pros and cons of the current system for the City as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES

- Review of existing compensation plan(s)

- Assessment of current conditions

**Task 3.0
Identify List of
Market Salary
Benchmarks and
Approved List of
Targets**

TASK GOALS

- Identify the proper benchmark positions for the external labor market assessment.

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

TASK ACTIVITIES

3.1　Identify the list of classifications (benchmarks) to include in the labor market assessment. **Note:** Evergreen will work with the CPM to select up to 60 classifications as benchmarks for the salary survey.

3.2　Submit the proposed list of positions to the CPM for review.

3.3　Based on the CPM's review, make revisions to the benchmark list and finalize consistent with Evergreen's analysis.

3.4　For each employee group review with the CPM peer organizations that must be included in the salary survey. **Note:** Evergreen will work with the CPM to identify up to 20 targets.

3.5　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 Gainesville area;
- economic and budget characteristics; and
- other demographic data.

3.6　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.

3.7 Review survey methodology with the CPM and refine survey methodology prior to distribution of survey.

3.8 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

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

- Initial list of survey peers

- Survey methodology

- Final list of survey organizations and contacts

Task 4.0 Conduct Market Survey and Provide External Assessment Summary

TASK GOALS

- Conduct the external labor market salary survey.

- Provide a summary of the survey results to the CPM for review.

TASK ACTIVITIES

4.1 Prepare a customized external labor market salary survey for the CPM's approval. Discuss questions and categories for the market survey. **Note:** Evergreen will survey peers as to what they provide as far as employee work/life effectiveness programs, etc.

4.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.

4.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.

4.4 Collect and enter survey results into Evergreen's electronic data analysis tools.

4.5 Validate all data submitted.

4.6 Develop summary report of external labor market assessment results.

4.7 Submit summary report of external labor market assessment results to the CPM.

KEY PROJECT MILESTONES

- Market survey instrument

- Summary report of external labor market assessment results

**Task 5.0
Conduct a Benefits
Survey**

TASK GOALS

- Conduct an external labor market benefits survey.

- Provide a summary of the benefits survey results to the CPM for review.

TASK ACTIVITIES

5.1 Develop a listing of the benefits provided by the City as compared to competitive employers.

5.2 Prepare benefits survey to be included with salary survey developed in **Task 4.0.**

5.3 Conduct a survey of benefits in use by competitive employers, to include both private and public employers, and make recommendations regarding the benefits which the City might competitively employ in its market.

5.4 Submit benefits survey to the CPM for review.

5.5 Revise benefits survey.

5.6 Distribute benefits survey in conjunction with salary survey.

5.7 Develop summary report of external labor market benefits results.

5.8 Submit summary report of external labor market benefits results to the CPM.

KEY PROJECT MILESTONES:

- Catalogue of existing City benefits

- Benefits survey instrument

- Summary report of external labor market benefits results

**Task 6.0
Develop Strategic
Positioning
Recommendations**

TASK GOALS

- Assess the appropriateness of the current compensation philosophy for the employees of the City that are included in the study.

- Develop a plan for employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

6.1 Identify the compensation philosophy and accompanying thresholds.

6.2   Using the market salary and benefits data collected in **Tasks 4.0 and 5.0**, determine the proper pay plans, including number of grades, steps, and ranges for employees included in the study.

6.3   Identify highly competitive positions within the City and customize recommendations for compensation where required.

6.4   Produce pay plans that best meet the needs of the City from an external equity standpoint.

KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account external equity

- Plan for addressing unique, highly competitive positions

Task 7.0 Develop and Submit Draft and Final Reports

TASK GOALS

- Develop and submit a draft and final report of the Total Compensation Study to the City of Olathe.

- Present the final report.

TASK ACTIVITIES

7.1   Produce a comprehensive draft report that captures the results of each previous step. **Note:** The draft report will include the costs associated with the implementation of the recommended compensation plan.

7.2   Submit the comprehensive draft report to the CPM for review and approval.

7.3   Make edits and submit necessary copies of the final report.

7.4   Present the final report to the City Commission and the City's Leadership Team, and Charter Officers.

7.5   Develop a communication plan for sharing study results with employees.

7.6   Develop implementation database to communicate the process and progress of this project to the CPM.

7.7   Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports

- Final presentation

- Communication plan

- Implementation and maintenance database

Task 8.0 Develop Recommendations for Compensation Administration

TASK GOAL

- Develop recommendations for the continued administration by City staff to sustain the recommended compensation plan.

TASK ACTIVITIES

8.1   Develop recommendations and guidelines for the continued administration and maintenance of the compensation plan, including recommendations and guidelines related to:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;

- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;

- the proper mix of pay;

- 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.

8.2   Recommend recruitment/retention strategies, where appropriate.

8.3   Present recommendations to the CPM for review.

KEY PROJECT MILESTONES

- Recommendations for compensation administration

- Recommendations for recruitment/retention policies

2.4 Proposed Timeline

Evergreen Solutions possesses the ability, staff, skills, and tools to conduct the Total Rewards Study for the City of Gainesville in three months of the project start date and following the signing of the contract. This is based on a tentative start date of January 1, 2018, and a completion date of March 30, 2018.

This project timeline can be modified in any way to best meet the needs of the City of Gainesville.

2.5
Potential
Challenges

With a study of this nature there are a few problems that could potentially occur including: communication between lines of authority; low response rate with regard to market salary and benefits survey; and budget constraints that could cause delays in implementation.

While Evergreen doesn't anticipate any of these problems occurring, in the event that one or more of these do arise, it will be communicated as soon as possible to City leadership in order to apply any corrective actions that might be necessary.

Section 3
Sample Study and Master Services Agreement

3.0 Sample Study and Master Services Agreement

We have attached a sample final report from a similar study we conducted as well as a draft Master Services Agreement that could be used in the event Evergreen is hired to conduct the Total Rewards Study for the City of Gainesville.

Salary and Benefits Survey for the City of Roswell, GA

FINAL REPORT
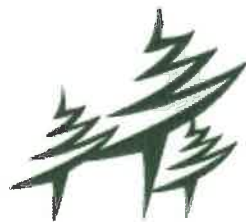
Evergreen Solutions, LLC

October 5, 2015

EVERGREEN SOLUTIONS, LLC

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Chapter 1 - Introduction

In June 2015, Evergreen Solutions was retained by the City of Roswell, Georgia (City) to conduct a Salary and Benefits Survey for employees in the general government classifications. The methodology and work plan developed to conduct this survey were designed to examine the wages and benefits of City employees in identified classifications compared to public and private sector peers in Georgia. Analyzing the results of the data enabled Evergreen Solutions to assess the external equity, or differences between the City's total compensation system and what is similarly available in the market.

Specifically, Evergreen Solutions was asked to perform the following tasks:

- evaluating the current compensation system for identified classifications at the City to determine the strengths and weaknesses of the current pay plans;

- conducting salary and benefits surveys and providing an external assessment summary to the City regarding current market competitiveness;

- developing strategic positioning recommendations using market data and best practices;

- developing a competitive compensation structure for the City; and

- developing and submitting draft and final reports summarizing findings and recommendations.

1.1   SURVEY METHODOLOGY

Evergreen Solutions combined qualitative as well as quantitative data analysis to produce an equitable solution with the purpose of maximizing the competitiveness of the City's compensation structure and practices.

Survey activities included:

- conducting a project kick-off meeting;
- assessing the current compensation structure;
- conducting market salary and benefits surveys;
- developing recommendations for a competitive pay structure;
- creating implementation plans for the proposed compensation system;
- developing compensation administration guidelines and reviewing pay practices; and
- creating draft and final reports for the City.

Kickoff Meeting

The kickoff meeting with the City's project team provided Evergreen Solutions an opportunity to discuss specific study goals, finalize the work plan, and begin the data collection process. The collection of relevant background material (including existing pay plans, current job descriptions, employee salary data, and other pertinent material) was a part of this process.

Assessment of Current Conditions

An analysis was conducted to assess the existing compensation structure for identified classifications within the City as well as a brief review of current employee demographics. The process revealed information about the existing structure and demographics and should be considered a snapshot in time. By reviewing information about the City's compensation structure and employee demographics, Evergreen Solutions gained a better understanding of the structures and methods in place to help identify issues for both further review and potential revision. A summary of this assessment can be found in **Chapter 2** of this report.

Salary and Benefits Surveys

For the salary survey, peers were identified that compete with the City for human resources and provide similar services. A number of classifications were selected as benchmarks representing a cross-section of the studied departments and levels of work at the City. After the selection of peers and benchmarks, a survey tool was developed for the collection of salary range data for each benchmark. A survey tool was also developed to collect detailed data about the core and fringe benefits offered by the peer organizations. The salary and benefits data collected during these surveys were analyzed, and a summary of the data can be found in **Chapter 3** of this report.

Recommendations

During the recommendation phase of the study, Evergreen Solutions developed a new market-based pay plan and slotted classifications into the pay plan based on internal and external equity. Next, implementation options were developed to transition employees' salaries into the new system, and the associated costs of adjusting employees' salaries were estimated. Information was then provided to the City on how to execute the recommended salary adjustments, as well as how to maintain the recommended compensation system over time. A summary of the recommendations made by Evergreen Solutions can be found in **Chapter 4** of this report.

1.2   REPORT ORGANIZATION

The remainder of this report includes the following chapters:

- **Chapter 2** – Assessment of Current Conditions
- **Chapter 3** – Market Summary
- **Chapter 4** - Recommendations

Chapter 2 – Assessment of Current Conditions

The purpose of this statistical evaluation is to provide an overall assessment of the structure of the City's pay plans for classifications included in this study. This chapter includes analyses of these plans, the placement of employee salaries within the current pay grades, and the distribution of employees among the City's departments. Data included here reflect the information at the point in time in which the study commenced and should be considered as a snapshot in time. This evaluation allowed Evergreen Solutions to gain a limited understanding of the compensation related conditions present at the City and identify issues for further review. It is important to note that while the data provided insight into the City's current compensation system, the findings in this chapter were not sufficient cause for recommendations on their own. Instead, the analyses served as a springboard for Evergreen Solutions to develop appropriately crafted recommendations for the City, which can be found in **Chapter 4** of this report.

2.1   PAY PLAN ANALYSIS

The City currently administers a compensation structure for the classifications included in this study that has two pay plans: a pay plan for regular employees, and a pay plan for department heads. **Exhibit 2A** illustrates the City's pay plan for regular employees, **Exhibit 2B** illustrates the City's pay plan for department heads. Both pay plans are designed as open-range plans, where there is an established minimum and maximum salary whereby employees may progress their salaries through the ranges over the course of a career. Progression of employees' salaries is accomplished primarily by pay increases linked to an employee's performance.

At the time of the study, the City employed a total of 357 employees in general government classifications; however, the Municipal Judge position was not assigned to a pay grade, and therefore only 356 employees are included in the following analyses. There were 348 employees in classifications assigned to the regular pay plan, and eight employees in classifications assigned to the department head pay plan.

The range spreads for classifications in both pay plans were a consistent 60.0 percent. Range spreads are the measure of the width of pay grades, calculated as the percent difference between the pay grade minimum and maximum, relative to the minimum.

EXHIBIT 2A
REGULAR EMPLOYEE PAY PLAN

Grade	Minimum	Midpoint	Maximum	Range Spread	Employees
101	$21,752.00	$ 27,189.00	$ 34,803.00	60.0%	5
102	$22,839.00	$ 28,549.00	$ 36,543.00	60.0%	40
104	$22,839.00	$ 28,549.00	$ 36,543.00	60.0%	11
105	$26,439.00	$ 33,049.00	$ 42,303.00	60.0%	21
106	$27,761.00	$ 34,701.00	$ 44,418.00	60.0%	17
107	$29,149.00	$ 36,436.00	$ 46,639.00	60.0%	50
108	$30,607.00	$ 38,258.00	$ 48,971.00	60.0%	29
109	$32,137.00	$ 40,171.00	$ 51,419.00	60.0%	10
110	$33,744.00	$ 42,180.00	$ 53,990.00	60.0%	17
111	$35,431.00	$ 44,289.00	$ 56,690.00	60.0%	13
112	$37,203.00	$ 46,503.00	$ 59,524.00	60.0%	12
113	$39,063.00	$ 48,828.00	$ 62,500.00	60.0%	9
114	$41,016.00	$ 51,270.00	$ 65,625.00	60.0%	32
115	$43,067.00	$ 53,833.00	$ 68,907.00	60.0%	13
116	$45,220.00	$ 56,525.00	$ 72,352.00	60.0%	11
117	$47,481.00	$ 59,351.00	$ 75,969.00	60.0%	13
118	$49,855.00	$ 62,319.00	$ 79,768.00	60.0%	8
119	$52,348.00	$ 65,435.00	$ 83,756.00	60.0%	3
120	$54,965.00	$ 68,706.00	$ 87,944.00	60.0%	11
121	$57,713.00	$ 72,142.00	$ 92,341.00	60.0%	5
122	$60,599.00	$ 75,749.00	$ 96,958.00	60.0%	9
123	$63,629.00	$ 79,536.00	$101,806.00	60.0%	3
124	$66,810.00	$ 83,513.00	$106,897.00	60.0%	1
125	$70,151.00	$ 87,689.00	$112,242.00	60.0%	3
128	$81,209.00	$101,511.00	$129,934.00	60.0%	2
Average/Total				60.0%	348

EXHIBIT 2B
DEPARTMENT HEAD PAY PLAN

Grade	Minimum	Midpoint	Maximum	Range Spread	Employees
330	$ 89,532.00	$111,911.00	$143,246.00	60.0%	5
332	$ 98,705.00	$123,382.00	$157,929.00	60.0%	2
336	$119,977.00	$149,972.00	$191,964.00	60.0%	1
Average/Total				60.0%	8

2.2   EMPLOYEE SALARY PLACEMENT BY GRADE

Exhibits 2C and **2D** provide a breakdown of the placement of employee salaries within each pay grade for each pay plan. It is important when assessing the effectiveness of an organization's pay practices to analyze where employee salaries are currently placed within each pay grade or pay plan. Identifying those areas where there may be clusters of employee salaries could illuminate potential pay progression concerns within the current pay plans. It should also be noted that employee salaries, and the progression of the same, is associated with an organization's compensation philosophy – specifically, the method of salary progression and the availability of resources. Therefore, the placement of employee salaries should be viewed with this context in mind.

Each exhibit contains the following: the pay grades, the number of employees in classifications assigned to the pay grade, the number and percentage of employees with salaries at the minimum, the number and percentage of employees with salaries below the midpoint, the number and percentage of employees with salaries above the midpoint, and the number and percentage of employees with salaries at the maximum of each pay grade.

EXHIBIT 2C
REGULAR EMPLOYEE PAY PLAN - SALARY PLACEMENT BY GRADE

Grade	Employees	# at Min	% at Min	# < Mid	% < Mid	# > Mid	% > Mid	# at Max	% at Max
101	5	0	0.0%	0	0.0%	5	100.0%	0	0.0%
102	40	11	27.5%	30	75.0%	10	25.0%	1	2.5%
104	11	0	0.0%	4	36.4%	7	63.6%	1	9.1%
105	21	0	0.0%	8	38.1%	13	61.9%	4	19.0%
106	17	0	0.0%	12	70.6%	5	29.4%	0	0.0%
107	50	0	0.0%	25	50.0%	25	50.0%	0	0.0%
108	29	0	0.0%	12	41.4%	17	58.6%	1	3.4%
109	10	0	0.0%	5	50.0%	5	50.0%	0	0.0%
110	17	0	0.0%	9	52.9%	8	47.1%	2	11.8%
111	13	0	0.0%	7	53.8%	6	46.2%	0	0.0%
112	12	0	0.0%	6	50.0%	6	50.0%	0	0.0%
113	9	0	0.0%	3	33.3%	6	66.7%	1	11.1%
114	32	0	0.0%	17	53.1%	15	46.9%	0	0.0%
115	13	0	0.0%	6	46.2%	7	53.8%	1	7.7%
116	11	1	9.1%	7	63.6%	4	36.4%	0	0.0%
117	13	0	0.0%	2	15.4%	11	84.6%	0	0.0%
118	8	0	0.0%	3	37.5%	5	62.5%	1	12.5%
119	3	0	0.0%	1	33.3%	2	66.7%	0	0.0%
120	11	0	0.0%	7	63.6%	4	36.4%	0	0.0%
121	5	0	0.0%	1	20.0%	4	80.0%	0	0.0%
122	9	0	0.0%	4	44.4%	5	55.6%	0	0.0%
123	3	0	0.0%	0	0.0%	3	100.0%	0	0.0%
124	1	0	0.0%	0	0.0%	1	100.0%	0	0.0%
125	3	0	0.0%	0	0.0%	3	100.0%	0	0.0%
128	2	0	0.0%	2	100.0%	0	0.0%	0	0.0%
Total	**348**	**12**	**3.4%**	**171**	**49.1%**	**177**	**50.9%**	**12**	**3.4%**

EXHIBIT 2D
DEPARTMENT HEAD PAY PLAN - SALARY PLACEMENT BY GRADE

Grade	Employees	# at Min	% at Min	# < Mid	% < Mid	# > Mid	% > Mid	# at Max	% at Max
330	5	0	0.0%	1	20.0%	4	80.0%	0	0.0%
332	2	0	0.0%	0	0.0%	2	100.0%	0	0.0%
336	1	0	0.0%	0	0.0%	1	100.0%	0	0.0%
Total	**8**	**0**	**0.0%**	**1**	**12.5%**	**7**	**87.5%**	**0**	**0.0%**

Employees with salaries at the grade minimum are generally new hires or they are new to their particular classification following a recent promotion; on the other hand, employees with salaries at the grade maximum are generally highly experienced and proficient in their classification. In the regular pay plan, there were 12 employees (3.4 percent) with salaries at their grade minimum and 12 employees (3.4 percent) with a salary at the grade maximum. In department head pay plans, no (0.0 percent) employees had salaries at their grade minimum or maximum.

Employees with salaries at the midpoint of a pay range should be fully proficient in their classification and require minimal supervision to complete their job duties, while performing satisfactorily. Within this framework, grade midpoint is commonly considered to be the salary an individual could reasonably expect for similar work in the market. Therefore, it is important to examine the percentage and number of employees with salaries above and below the midpoint of the pay grade. Of the 348 employees with classifications in the regular pay plan, 171 employees (49.1 percent) had salaries below the midpoint of their respective range, while 177 employees (50.9 percent) had salaries above the midpoint. Finally, of the eight employees with classifications in the department head pay plan, one (12.5 percent) had a salary below the midpoint of the respective range, and seven (87.5 percent) had salaries above the midpoint.

2.3   SALARY QUARTILE ANALYSIS

This section provides an analysis of the distribution of employee salaries across pay grades. Examining employee salary placement by grade quartile provided insight into the clustering of employee salaries within each pay grade. For this analysis, employee salaries were slotted within one of four equal distributions. The first quartile (0-25) represents the lowest 25.0 percent of the pay range. The second quartile (26-50) represents the segment of the pay range above the first quartile up to the pay range's midpoint. The third quartile (51-75) represents the part of the pay range above the midpoint up to the 75th percentile of the pay range. The fourth quartile (76-100) is the highest 25.0 percent of the pay range. This analytical method provided an opportunity to assess how employee salaries are disbursed throughout a particular pay range.

Exhibit 2E provides a breakdown of the total number of employees assigned to classifications in the regular pay plan. The exhibit provides the number of employees per pay grade and the location (by quartile) of employee salaries within each grade. For those employees with classifications in the regular pay plan, it was noted that employee salaries were distributed throughout the pay range. Specifically, it was noted that the largest cluster, 97 employees or 27.9 percent, had salaries in the first quartile of their respective pay ranges. In this analysis, the next largest cluster of employee salaries was found in the third quartile with 93 employees, or 26.7 percent; additionally, 74 employees had salaries in the second quartile of their respective pay ranges, and employees (84) had salaries in the fourth quartile of their respective pay ranges. The distribution of salaries throughout the pay ranges is similar to what would be expected in a merit based pay progression system, and may indicate that salaries are progressing consistent with this compensation philosophy.

EXHIBIT 2E
REGULAR EMPLOYEE PAY PLAN - SALARY QUARTILE ANALYSIS

GRADE	Total Employees	1st Quartile # Employees	2nd Quartile # Employees	3rd Quartile # Employees	4th Quartile # Employees
101	5	-	-	3	2
102	40	20	10	8	2
104	11	2	2	6	1
105	21	4	4	8	5
106	17	10	2	-	5
107	50	14	11	10	15
108	29	6	6	5	12
109	10	5	-	4	1
110	17	5	4	4	4
111	13	3	4	5	1
112	12	3	3	5	1
113	9	1	2	4	2
114	32	10	7	11	4
115	13	3	3	3	4
116	11	6	1	1	3
117	13	1	1	5	6
118	8	-	3	2	3
119	3	-	1	1	1
120	11	1	6	-	4
121	5	1	-	1	3
122	9	2	2	2	3
123	3	-	-	1	2
124	1	-	-	1	-
125	3	-	-	3	-
128	2	-	2	-	-
Overall Total	**348**	**97**	**74**	**93**	**84**

Exhibit 2F displays graphically how salaries for employees in the regular employee pay plan fall across the quartiles within each pay grade.

EXHIBIT 2F
REGULAR EMPLOYEE PAY PLAN
QUARTILE ANALYSIS (PERCENTAGE OF EMPLOYEES BY PAY GRADE)
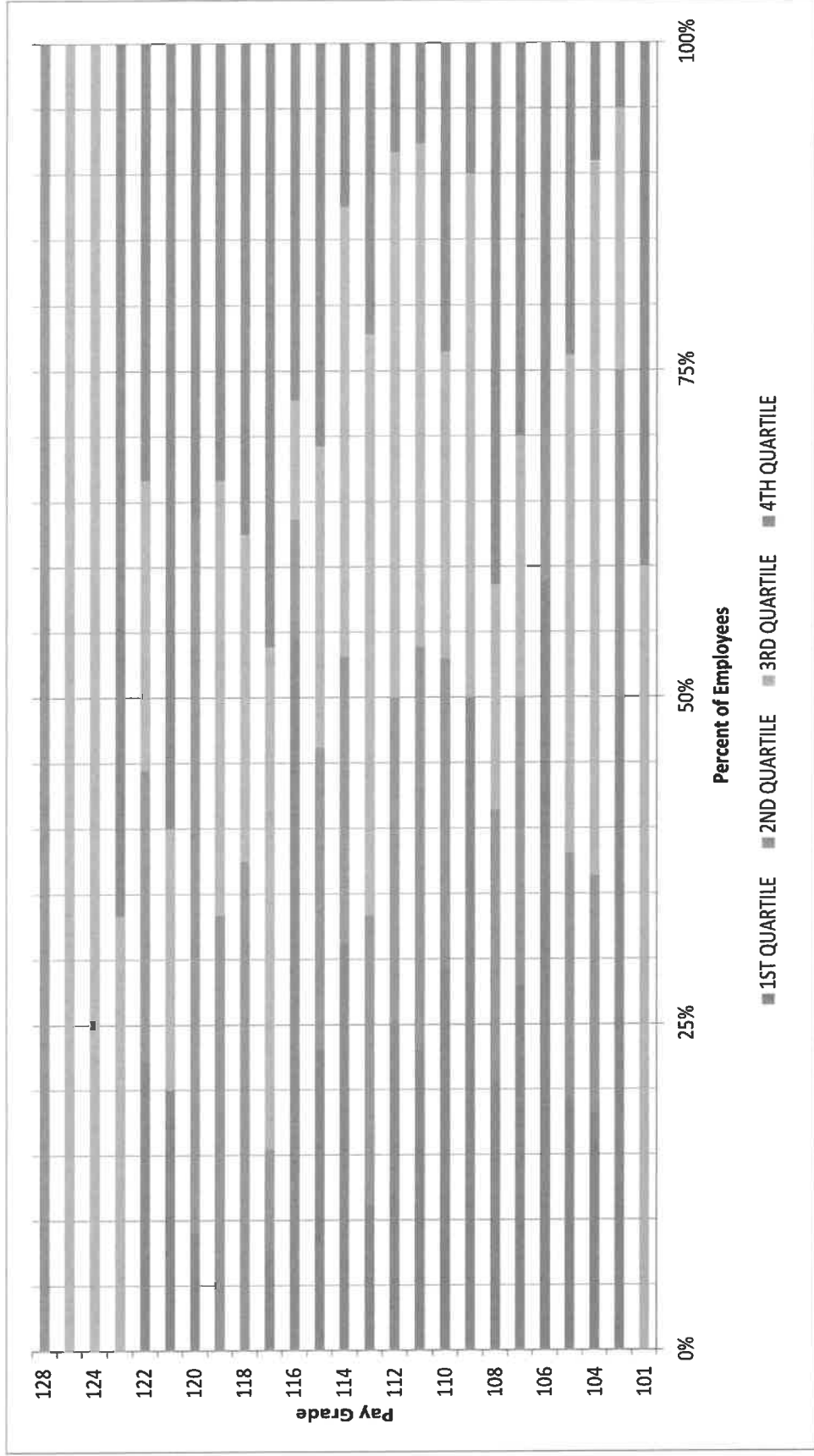
Exhibit 2G displays the salary quartile information for employees with classifications in the department head pay plan.

EXHIBIT 2G
DEPARTMENT HEAD PAY PLAN – SALARY QUARTILE ANALYSIS

GRADE	Total Employees	1st Quartile # Employees	2nd Quartile # Employees	3rd Quartile # Employees	4th Quartile # Employees
330	5	-	1	3	1
332	2	-	-	2	-
336	1	-	-	-	1
Overall Total	**8**	**0**	**1**	**5**	**2**

In this analysis, it was noted that the majority of employees with classifications in the department head pay plan had salaries above the midpoint. Furthermore, five (62.5 percent) had salaries in the third quartile, and two employees (25.0 percent) had salaries in the fourth quartile. This distribution of employee salaries in this pay plan may reveal that either employees' salaries are progressing at a pace consistent with a merit based pay system and/or employees in these classifications received salaries when they were hired or promoted that were closer to the midpoint of the salary range.

Salary and Benefits Survey for the City of Roswell, GA

Exhibit 2H, below, displays the same quartile information graphically for the department head pay plan.

EXHIBIT 2H
DEPARTMENT HEAD PAY PLAN
QUARTILE ANALYSIS (PERCENTAGE OF EMPLOYEES BY PAY GRADE)
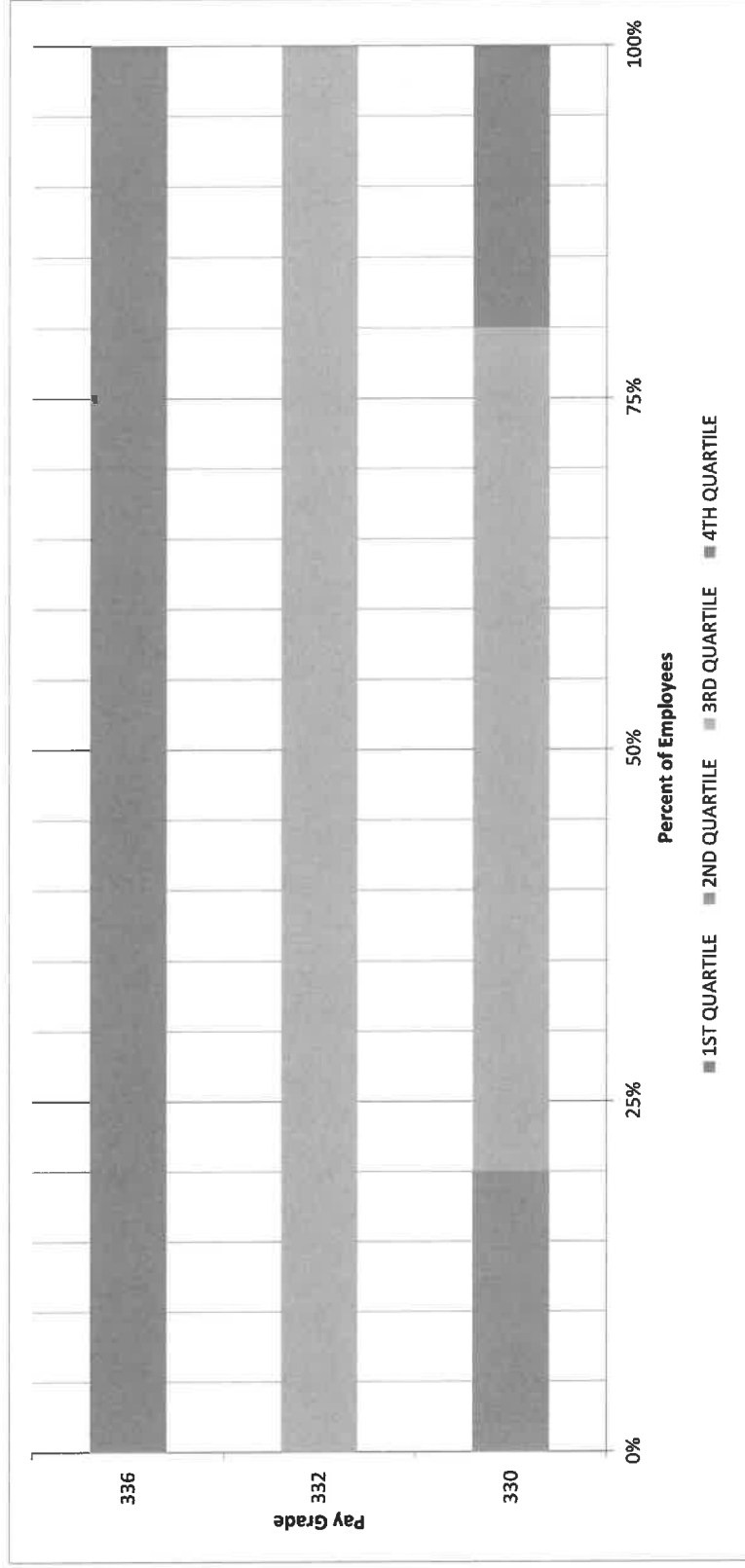
2.4   EMPLOYEES BY DEPARTMENT

At the time of the study, and for the classifications included in the study, the City employed 356 full-time individuals in general government classifications across seven departments. The following analysis is intended to provide basic information regarding how employees are distributed among these departments. **Exhibit 2I** depicts the number of employees and the number of classifications in each department. This exhibit also displays the overall percentage breakdown of employees by department.

EXHIBIT 2I
GENERAL GOVERNMENT EMPLOYEES BY DEPARTMENT

Department	Employees	Classes	% of Total
ADMINISTRATION	49	39	13.8%
COMMUNITY DEVELOPMENT	25	17	7.0%
FINANCE	26	14	7.3%
FIRE	4	2	1.1%
PUBLIC WORKS/ENVIRONMENTAL	94	38	26.4%
RECREATION & PARK	99	29	27.8%
TRANSPORTATION	59	32	16.6%
Total	**356**	**171**	**100.0%**

2.5   SUMMARY

Overall, the City's compensation structure offers a good foundation on which to improve. The key points of the current structure are:

- For positions included in this study, the City administered two pay plans, one for regular employees, and one for department heads.

- These employee pay plans were designed as open-range plans, whereby employee salaries may progress through the range over the course of a career.

- Employees' salaries in both plans were distributed in a manner similar to what would be expected in a performance based pay system.

The City's compensation system has provided employees with a clear pay structure, and it appears that employee' salaries have progressed over time. As a pay system is intended to encourage employee salary growth based on an organization's compensation philosophy, the distribution of employee' salaries appears to indicate that the City's performance based system is working.

The information gained from the review of current conditions was used in conjunction with the market analysis data to develop recommendations for a compensation system that would

best align with the City's compensation philosophy moving forward. These recommendations are provided in **Chapter 4** of this report.

Chapter 3 – Market Summary

This chapter provides the City with a market analysis in which the City's salary ranges and benefit offerings were compared to the salary ranges and benefits at peer organizations. The data from targeted market peers were used to evaluate the overall compensation and benefits at the City at the time of this study. It is important to note that the market comparisons contained herein do not translate at the individual level and are instead used to provide the City with overall analyses. The utilized methodology is not intended to evaluate particular salaries or benefits offered to individuals because individual compensation packages (including benefits) are determined through a combination of factors, which could include: the demand for a particular job, a candidate's prior experience, or an individual's negotiation skills during the hiring process.

Furthermore, it should be noted that market comparisons are best thought of as a snapshot of current market conditions. In other words, market conditions change, and in some cases change quickly; so while market surveys are useful for making updates to salary structures or benefits offered to employees, they must be done at regular intervals if the City wishes to remain current with its market peers and market salary trends.

3.1   PUBLIC SECTOR SALARY SURVEY RESULTS

Evergreen Solutions collected pay range information from public sector targeted peers in the City's competitive market utilizing a survey tool. Development of this tool included selecting benchmark classifications. The desired outcome of benchmarking is to select a cross-section of the City's classifications, so that the surveyed positions make up a subset of all work areas and levels of classifications in the City. The classification title, a description of assigned duties, and the education and experience requirements were provided in the survey tool for each benchmarked classification.

The public sector targeted peers were selected by Evergreen Solutions in collaboration with the City's project management team. Several factors were utilized when developing this peer list, including geographic proximity to the City, organization size, and the relative population size being served by the organization.

All data collected were adjusted for cost of living using a national cost of living index factor; this allowed salary dollars from organizations outside of the immediate area to be adjusted for the cost of living relative to the City. **Exhibit 3A** provides the list of nine market peers from which data were collected.

EXHIBIT 3A
MARKET PEERS

Peer Data Collected
Alpharetta, GA
Duluth, GA
Dunwoody, GA
Marietta, GA
Milton, GA
Smyrna, GA
Woodstock, GA
Cherokee County, GA
Cobb County, GA

Based on guidance for the City, Evergreen Solutions utilized a comparison of their current structure, or salary ranges for the benchmark classifications to the 50th percentile of the resultant peer data. **Exhibit 3B** provides a summary of the results of the salary market data. The exhibit contains the following information:

- The market range minimum, midpoint, and maximum. The survey range minimum indicates the 50th percentile of the minimum peer salary data for each classification provided by the peer organizations. Survey range midpoint provides the 50th percentile of the midpoint of the peer respondents for each classification surveyed. Survey range maximum provides the 50th percentile of the maximum of the survey participants for each classification surveyed.

- The market salary range information for each classification. This includes the average of the peers' responses for the salary range minimum, midpoint, and maximum for each benchmarked classification. The survey range minimum indicates the average minimum salary for each classification provided by the 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 result of the City's current salary range compared to the market, or the percent differentials. The percent differentials are shown for survey market range minimum, midpoint, and maximum. The differentials specify how the City's current salary ranges compare to the market average shown in the exhibit. A positive differential indicates the City is above market for that classification at the range minimum, midpoint, or maximum. A negative differential indicates the City 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 all of the classifications' percent differentials.

- The survey average range. The second column from the right provides the average range width for each classification surveyed, which is determined by the average minimum and average maximum salaries of the respondents. The average range spread for all of the classifications is provided in the final row of the exhibit.

- The total number of survey responses for each classification. This information is provided in the final column, and the average number of responses for all of the classifications is provided in the final row.

EXHIBIT 3B
SALARY SURVEY MARKET SUMMARY

Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg Range	# Resp
	50th Percentile	% Diff	50th Percentile	% Diff	50th Percentile	% Diff		
Accountant	$ 42,621.28	5.7%	$ 55,730.84	5.2%	$ 67,350.00	6.9%	57.4%	6
Accounting Specialist I	$ 34,788.16	-19.3%	$ 43,861.97	-15.7%	$ 52,935.78	-13.5%	58.6%	5
Administrative Assistant	$ 35,649.46	-16.5%	$ 44,994.33	-13.1%	$ 54,339.19	-11.0%	55.5%	8
Administrative Specialist I	$ 27,329.08	-3.4%	$ 34,161.36	0.6%	$ 40,993.63	3.1%	54.9%	5
Administrative Specialist II	$ 30,103.64	-3.3%	$ 37,622.91	0.7%	$ 45,714.43	2.0%	51.7%	4
Benefits Manager	$ 56,775.35	-13.9%	$ 70,572.53	-8.9%	$ 88,215.66	-10.6%	55.1%	5
Budget Analyst	$ 46,379.30	-13.1%	$ 58,640.79	-10.0%	$ 71,623.99	-9.1%	57.3%	5
Building Operations Manager	$ 52,582.44	8.9%	$ 67,267.63	10.3%	$ 81,952.83	11.2%	54.4%	4
Buyer I	$ 34,127.73	-1.1%	$ 42,215.22	3.8%	$ 51,406.16	4.8%	52.4%	6
City Administrator	$ 98,071.46	18.3%	$ 127,147.09	18.5%	$ 164,233.28	14.4%	52.4%	7
City Clerk	$ 65,998.91	-32.4%	$ 78,632.99	-21.3%	$ 98,998.37	-24.1%	53.2%	8
City Engineer	$ 68,534.10	-2.6%	$ 84,771.89	2.4%	$ 104,593.35	2.2%	53.8%	4
Community Development Director	$ 78,824.82	12.0%	$ 98,054.50	15.8%	$ 120,164.80	16.1%	54.3%	8
Community Relations Manager	$ 64,523.82	-6.5%	$ 80,654.27	-2.4%	$ 96,784.73	0.2%	51.6%	3
Crew Worker	$ 26,167.80	-14.6%	$ 34,018.14	-14.6%	$ 41,730.76	-14.2%	52.9%	7
Custodian	$ 23,777.49	-9.3%	$ 29,206.02	-3.3%	$ 34,634.56	0.5%	50.6%	4
Deputy City Administrator	$ 91,505.57	7.3%	$ 117,644.60	8.3%	$ 137,455.26	13.0%	50.2%	4
Deputy Envir/Public Works Dir	$ 58,173.55	17.1%	$ 71,631.03	21.5%	$ 88,093.40	21.5%	55.1%	4
Director of IT	$ 69,421.19	14.5%	$ 91,093.92	13.7%	$ 106,570.60	18.0%	54.3%	7
Environmental/Pw Director	$ 87,505.31	2.3%	$ 108,777.65	6.5%	$ 131,257.96	8.4%	53.4%	6
Equipment Operator I	$ 26,167.80	-14.6%	$ 34,018.14	-14.6%	$ 41,868.48	-14.6%	53.8%	5
Equipment Operator II	$ 28,382.93	-2.2%	$ 36,179.79	-0.3%	$ 43,977.16	1.0%	53.6%	4
Equipment Operator III	$ 30,246.36	-3.8%	$ 37,807.95	0.2%	$ 45,369.54	2.7%	54.8%	7
Executive Assistant	$ 40,661.34	-14.8%	$ 50,710.80	-10.1%	$ 61,139.69	-7.8%	55.2%	9
Finance Director	$ 81,237.34	9.3%	$ 102,035.12	12.3%	$ 122,332.41	14.6%	53.0%	8
Financial Services Manager	$ 58,514.91	-35.9%	$ 72,066.11	-28.7%	$ 90,749.92	-31.7%	57.2%	5
Fleet Mechanic I	$ 30,888.08	-16.8%	$ 38,304.52	-11.4%	$ 46,671.78	-10.3%	51.7%	4
Fleet Services Manager	$ 46,379.30	-13.1%	$ 57,244.33	-7.4%	$ 69,982.84	-6.6%	57.8%	5
GIS Manager	$ 52,172.67	-4.6%	$ 66,519.72	-2.6%	$ 80,866.76	-1.4%	54.5%	5
Human Resources Director	$ 73,250.93	9.8%	$ 94,708.29	10.3%	$ 112,030.33	13.8%	54.2%	7
IT Manager	$ 62,616.56	-3.3%	$ 79,778.21	-1.3%	$ 96,939.86	0.0%	53.6%	6
Meter Technician	$ 29,290.11	-5.5%	$ 36,234.00	-0.4%	$ 44,080.97	0.8%	51.0%	4

EXHIBIT 3B (CONTINUED)
SALARY SURVEY MARKET SUMMARY

Classification	Survey Minimum		Survey Midpoint		Survey Maximum		Survey Avg Range	# Resp
	50th Percentile	% Diff	50th Percentile	% Diff	50th Percentile	% Diff		
Parks Coordinator	$ 47,321.51	0.3%	$ 60,335.01	2.3%	$ 73,348.50	3.4%	56.8%	5
Payroll Manager	$ 45,068.30	-4.6%	$ 57,462.50	-2.6%	$ 69,855.66	-1.4%	57.0%	7
Planner I	$ 39,466.44	-6.1%	$ 50,021.49	-3.4%	$ 60,576.54	-1.8%	54.3%	4
Planner II	$ 44,081.75	-7.5%	$ 55,583.62	-4.2%	$ 67,085.48	-2.2%	52.3%	5
Planner III	$ 49,012.97	-8.4%	$ 61,350.25	-4.4%	$ 74,034.74	-2.3%	52.5%	5
Planning & Zoning Director	$ 61,394.13	3.5%	$ 75,537.96	8.7%	$ 92,091.69	9.5%	56.6%	7
R&P Program Supervisor I	$ 32,282.49	13.2%	$ 41,923.19	13.3%	$ 51,563.88	13.4%	56.8%	4
R&P Program Supervisor II	$ 41,373.62	-0.9%	$ 51,491.80	3.4%	$ 62,635.37	4.6%	56.4%	6
Recreation & Parks Director	$ 76,085.30	15.0%	$ 94,461.28	18.8%	$ 115,392.00	19.4%	54.3%	8
Senior Transportation Engineer	$ 64,609.75	-17.5%	$ 80,704.46	-12.9%	$ 98,477.47	-12.0%	55.5%	6
Special Events Manager	$ 45,971.62	-6.7%	$ 57,464.77	-2.6%	$ 68,957.93	-0.1%	56.4%	5
Transportation Director	$ 81,237.34	9.3%	$ 97,828.65	15.9%	$ 122,332.41	14.6%	56.2%	3
Water Utility Manager	$ 52,172.67	5.1%	$ 66,519.72	6.9%	$ 80,866.76	8.0%	55.7%	3
Overall Average		**-3.3%**		**0.1%**		**1.2%**	**54.5%**	**5.5**

Market Minimums

A starting point of the analysis was to compare the peer 50th percentile market minimum for each classification to the City's range minimums. Market minimums are generally considered as an entry level salary for employees who meet the minimum qualifications of a classification. Those employees with salaries at or near the range minimums are unlikely to have mastered the job and probably have not acquired the skills and experience necessary to be fully proficient in their classification.

As **Exhibit 3B** illustrates, the City is, on average, approximately 3.3 percent below market at the minimum of the respective salary ranges. Several conclusions can be drawn based on the collected data:

- The surveyed position differentials ranged from 35.9 percent below market minimum in the case of the Financial Services Manager classification to 18.3 percent above market for the City Administrator classification.

- Of the 46 positions with market minimum percent differentials, 30 classifications (65.2 percent) were below market at the minimum.

- The following two positions were greater than 20.0 percent below market.

  - Financial Services Manager, 25.9 percent below market
  - City Clerk, 32.4 percent below market

Market Midpoints

This section explores the comparison between the 50th percentile of the peer midpoints and the midpoints for classifications at the City. Market midpoints are important to consider because they are commonly recognized as the salary point at which employees have achieved full proficiency, and are performing satisfactorily in their classification. As such, midpoint is often considered as the salary point at which a fully proficient employee could expect their salary to be placed.

As **Exhibit 3B** illustrates, the City is, on average, 0.1 percent above market at the midpoint of the respective salary ranges. Based on the collected data, the following observations can be made:

- The surveyed position differentials ranged from 28.7 percent below market midpoint in the case of the Financial Services Manager classification to 21.5 percent above market for the Deputy Environmental/Public Works Director classification.

- Of the 46 positions with market midpoint percent differentials, 23 classifications (50.0 percent) are below market at the midpoint.

- The following two positions were greater than 20.0 percent below market.

  - Financial Services Manager, 28.7 percent below market
  - City Clerk, 21.3 percent below market

Market Maximums

In this section, the 50th percentile of the peer salary range maximums are compared to the City's range maximums for each benchmarked classification. The market maximum is significant as it represents the upper limit salary that an organization might provide to retain and/or reward experienced and high performing incumbents. Being competitive at the maximum allows organizations to attract highly qualified employees for in-demand positions.

As **Exhibit 3B** illustrates, the City is, on average, 1.2 percent above market at the maximum of the respective salary ranges. Based on the collected data, the following observations can be made:

- The surveyed position differentials ranged from 31.7 percent below market maximum in the case of the Financial Services Manager classification to 21.5 percent above market for the Deputy Environmental/Public Works Director classification.

- Of the 46 positions with market midpoint percent differentials, 18 classifications (39.1 percent) are below market at the maximum.

- The following two positions were greater than 20.0 percent below market.

  - Financial Services Manager, 31.7 percent below market
  - City Clerk, 24.1 percent below market

3.2   PRIVATE SECTOR MARKET DATA

Some positions at the City can be found in the private sector. To supplement the public sector data for these positions, private sector salary data for August 2015 from Economic Research Institute (ERI) were analyzed. **Exhibit 3C** summarizes the ERI private sector salary data for businesses across all industries. The local region is centered on the City of Atlanta, GA with a budget of 68.1 million. While salary data from the private sector are useful in determining characteristics of the market as a whole, there are inherent differences between private and public sector classifications which make it difficult to draw conclusions about public sector salary ranges entirely from private sector data. Only those classifications with skills that are more easily transferable to the private sector are included in **Exhibit 3C**. Private sector market data were considered when making pay grade recommendations, which are discussed in **Chapter 4** of this report.

EXHIBIT 3C
PRIVATE SECTOR MARKET DATA

Classification	ERI Minimum	% Diff	ERI Midpoint	% Diff	ERI Maximum	% Diff	Survey Avg Range
Accountant	$ 46,821.00	-3.5%	$ 60,862.00	-3.5%	$ 80,083.00	-10.7%	71.0%
Accounting Specialist I	$ 27,595.00	5.3%	$ 38,323.00	-1.1%	$ 50,283.00	-7.8%	82.2%
Administrative Assistant	$ 28,703.00	6.2%	$ 40,472.00	-1.7%	$ 55,444.00	-13.2%	93.2%
Administrative Services Manager	$ 56,931.00	-8.8%	$ 80,183.00	-17.8%	$ 111,301.00	-32.9%	95.5%
Administrative Specialist I	$ 23,386.00	11.5%	$ 31,237.00	9.1%	$ 40,295.00	4.7%	72.3%
Benefits Manager	$ 67,445.00	-35.3%	$ 95,070.00	-46.7%	$ 131,188.00	-64.5%	94.5%
Budget Analyst	$ 44,532.00	-8.6%	$ 63,531.00	-19.1%	$ 88,817.00	-35.3%	99.4%
Building Operations Manager	$ 55,611.00	3.6%	$ 77,496.00	-3.3%	$ 106,106.00	-14.9%	90.8%
Buyer I	$ 42,414.00	-25.7%	$ 60,760.00	-38.5%	$ 85,104.00	-57.6%	100.7%
Community Relations Manager	$ 60,774.00	-0.3%	$ 86,460.00	-9.8%	$ 120,520.00	-24.3%	98.3%
Crew Worker	$ 23,609.00	-3.4%	$ 33,321.00	-12.2%	$ 43,853.00	-20.0%	85.7%
Custodian	$ 20,037.00	7.9%	$ 27,436.00	3.0%	$ 35,462.00	-1.9%	77.0%
Director of IT	$ 100,873.00	-24.2%	$ 135,316.00	-28.2%	$ 177,435.00	-36.6%	75.9%
Equipment Operator I	$ 31,051.00	-36.0%	$ 46,426.00	-56.4%	$ 66,003.00	-80.6%	112.6%
Executive Assistant	$ 41,243.00	-16.4%	$ 62,573.00	-35.8%	$ 89,732.00	-58.3%	117.6%
Finance Director	$ 128,014.00	-43.0%	$ 251,911.00	-116.4%	$ 401,960.00	-180.6%	214.0%
Financial Services Manager	$ 76,068.00	-76.6%	$ 107,985.00	-92.9%	$ 149,660.00	-117.2%	96.7%
Fleet Mechanic I	$ 33,143.00	-25.4%	$ 46,749.00	-36.0%	$ 63,816.00	-50.9%	92.5%
Fleet Services Manager	$ 57,916.00	-41.2%	$ 82,517.00	-54.8%	$ 114,578.00	-74.6%	97.8%
Human Resources Director	$ 97,563.00	-20.1%	$ 136,482.00	-29.3%	$ 184,301.00	-41.8%	88.9%
IT Manager	$ 77,745.00	-28.3%	$ 109,879.00	-39.5%	$ 152,082.00	-56.9%	95.6%
Payroll Manager	$ 57,658.00	-33.9%	$ 82,258.00	-46.9%	$ 113,843.00	-65.2%	97.4%
Planner I	$ 42,565.00	-14.4%	$ 61,877.00	-27.9%	$ 87,308.00	-46.7%	105.1%
Senior Transportation Engineer	$ 50,889.00	7.4%	$ 74,328.00	-4.0%	$ 105,879.00	-20.4%	108.1%
Special Events Manager	$ 49,531.00	-15.0%	$ 71,498.00	-27.7%	$ 101,726.00	-47.6%	105.4%
Overall Average		**-16.7%**		**-29.5%**		**-46.2%**	**98.7%**

After examining the private sector data above, the following conclusions for the selected benchmark positions can be drawn:

- The City is approximately 16.7 percent below the private sector minimum.

- The City is approximately 29.5 percent below the private sector midpoint.

- The City is approximately 46.2 percent below the private sector maximum.

- The City falls further behind the private sector when moving from the minimum to the midpoint, and is even further behind at the maximum. One attributable reason for this differentiation at the minimum, midpoint, and maximum is the difference in range spreads between the City and the private sector market. The average private sector salary range spread is 98.7 percent, which is significantly greater than the City's average range spread of 60.0 percent for those comparable classifications in the general employee play plan.

Additional Salary Survey Market Data

When surveying market peer organizations, the City also desired to obtain additional pay practice related information. Not all peer organizations responded to each of the questions. As such, the following questions were asked and the peer responses are summarized below:

- **How are salaries adjusted?**

  - Of the responding peers, five offered performance/merit, while five offered COLA. Three of these peers offered both types of adjustments to employees' salaries.

- **In the last five (5) years, what were the dates and amounts of merit increases given?**

  - Of the responding peers, only one responded that they had provided increases prior to the 2014 year. Most of the respondents only provided increases in 2014 and 2015, with three organizations not offering any increases in the last five years. The increases ranged from 1.0 to 3.4 percent.

- **In the last five (5) years, what were the dates and amounts of COLA increases given?**

  - Of the responding peers, three responded that they had provided increases prior to the 2014 year. Two organizations did not offer any increases in the last five years. The increases ranged from 1.0 to 3.0 percent.

- **What are your future plans for merit increases?**

  - Responses to this question varied significantly, two peers said the City had a 3.0 percent increase projected for 2016, two said the increase will be determined in the future by the council, and one said that no increases were projected.

- **What are your future plans for COLA increases?**

  - Of the responding peers, two said the increase will be determined in the future by the council, one said that no increases were projected, one peer said that a 2.5 percent increase was projected for 2015, and one peer has a 2.0 percent increase projected for 2016.

- **What is the year of your last salary adjustment?**

  - The answers varied from 2000 to July of 2015.

- **How do you handle employees who have maxed out their paygrade when pay increases are given?**

  - Of the responding peers, two offer a lump sum, one peer offers a single $500 bonus, two offer quarterly payments, and one organization allows the employees' salary to go beyond the maximum.

- **What is your organization's current turnover rate and average employee tenure?**

  - Of the responding peers, the average turnover rates varied between 4.4 and 18.1 percent. While the average tenure was between 4.5 and 10.4 years.

- **How frequently are your job descriptions updated?**

  - Of the responding peers, four peers update job descriptions as needed, while one peer said every three to five years, one said every three to four years, and two peers update them annually.

3.3   SALARY DATA SUMMARY

It should again be noted that the standing of a classification's pay range compared to the market is not a definitive assessment of an individual employee's salary being equally above or below market. A salary range does, however, speak to the City's general ability to recruit and retain talent over time. If a range minimum is significantly lower than the market would offer, the City could find itself losing out to their market peers when they seek to fill a position. It is equally true that range maximums lower than the market maximums may serve as a disincentive for tenured employees to remain at the City.

3.4   BENEFITS SURVEY RESULTS

In addition to the salary survey, Evergreen Solutions conducted a benefits survey for the City. Much like the salary analysis, the below benefits review represents a snapshot in time of what is offered by peer organizations, and provides the City with some understanding of the total compensation (salary and benefits) offered by its peers. While comparison data is provided in the following sections, a line-by-line comparison of benefits offerings is not

recommended since different organizations often have different philosophies regarding the importance of specific benefits. Furthermore, benefits are usually negotiated and acquired through third parties, which often makes individual comparisons even more difficult.

Evergreen Solutions sought to receive benefits data from the same peers identified for the salary survey. **Exhibit 3D** provides the 10 market peers from which benefits data were received or collected.

EXHIBIT 3D
BENEFITS RESPONDENTS

Peer Data Collected
Dunwoody, GA
Alpharetta, GA
Decatur, GA
Duluth, GA
Marietta, GA
Milton, GA
Smyrna, GA
Woodstock, GA
Cherokee County, GA
Cobb County, GA

General Benefits

Exhibit 3E shows the count and percentage breakdown of the peers and City's full-time and part-time employees. On average, the respondents had more full-time employees than the City in both the count and percentage. However, the City had more part-time employees, on average, than the peers in both the count and percentage. The number of full-time and part-time employees can influence the benefits offered by an organization and thus are provided below:

EXHIBIT 3E
FULL-TIME AND PART-TIME EMPLOYEES

Organization Demographics	Peer Average		City of Roswell, GA	
Full-Time Employees	845	81.9%	604	63.5%
Part-Time Employees	187	18.1%	347	36.5%

Benefits as a percentage of total compensation is a common broad indicator that organizations use to assess how generous benefits are at individual organizations. As **Exhibit 3F** shows, the market average for benefits as a percentage of total compensation was approximately 41.1 percent based on the information provided. Benefits as a part of total compensation values over 30.0 percent are considered high. It is not uncommon for this number to range widely from low to high depending on the compensation philosophy adopted by an organization and the relative cost of health benefits. The benefits as a percentage of total compensation for the City is 38.1 percent.

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EXHIBIT 3F
BENEFITS AS PERCENT OF TOTAL COMPENSATION

</div>

Total Compensation	Peer Average	City of Roswell, GA
Benefits as a percentage of total compensation	41.1%	38.1%

Employee Health Plans

Exhibit 3G shows the number of health plans offered to current employees by the responding peers and the City. The average number of health plans offered (any combination of HMO, HSA, PPO, or other) is 2.3 based on the market data. The City offers one health plan, a HSA.

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EXHIBIT 3G
NUMBER OF HEALTH PLANS

</div>

Number of Plans	Peer Average	City of Roswell, GA
Number of health plans offered	2.3	1

Exhibit 3H displays the average percentage of premiums paid by the employer for HMO, PPO, HSA, and other insurance plans. Of the peers who responded, 50.0 percent offered at least one PPO plan, 33.3 percent offered at least one HMO plan, and 11.1 percent offered a HSA. The average percentage of premium paid by peers for a HSA plan is 91.0 percent for employee only, 89.0 percent for employee plus child, 90.0 percent for employee plus spouse, and 89.0 percent for family coverage. For the City's HSA plan the City pays 84.1 percent of the premium for employee only, 88.5 percent for employee plus child, 89.0 percent for employee plus spouse, and 90.4 percent for family coverage. The City and City employees pay lower premiums for their HSA plans than peer organizations pay for their HSA plans, with the exception of the employee only coverage premium paid by the employee. However, the City employees pay less for employee plus child, employee plus spouse, and employee plus family coverages.

Exhibit 3H also provides the average peer deductibles compared to the deductibles offered in the City's plan. The average deductibles for peer HSA plans are very similar to the deductibles provided by the City's HSA plan.

EXHIBIT 3H
CURRENT EMPLOYEE HEALTH PLAN PREMIUMS AND DEDUCTIBLES

Health Plan Premiums & Deductibles	Peer HMO Average	Peer PPO Average	Peer HSA Average	Other Plans Average	HSA - City of Roswell, GA
Percentage of peers offering each plan	50.0%	33.3%	11.1%	90.0%	-
DOLLAR AMOUNT (monthly) of employee premium paid by employer	$447.95	$594.70	$499.63	$443.92	$386.53
PERCENTAGE (monthly) of employee premium paid by employer	91.8%	87.7%	91.0%	91.6%	84.1%
DOLLAR AMOUNT (monthly) of employee premium paid by employee	$52.28	$91.88	$49.41	$48.67	$72.84
PERCENTAGE (monthly) of employee premium paid by employee	8.2%	12.3%	9.0%	8.4%	15.9%
Individual Maximum Deductible In Network	$908.33	$1,166.67	$2,000.00	$1,650.00	$2,000.00
Individual Maximum Deductible Out of Network	-	$2,083.33	-	$4,300.00	$4,000.00
DOLLAR AMOUNT (monthly) of employee plus child premium paid by employer	$847.29	$1,017.75	$924.71	$863.07	$756.20
PERCENTAGE (monthly) of employee plus child premium paid by employer	84.9%	79.8%	89.0%	83.9%	88.5%
DOLLAR AMOUNT (monthly) of employee plus child premium paid by employee	$151.30	$270.46	$114.29	$159.46	$98.22
PERCENTAGE (monthly) of employee plus child premium paid by employee	15.1%	20.2%	11.0%	16.1%	11.5%
Employee Plus Child Maximum Deductible In Network	$2,820.00	$2,833.33	$4,000.00	$3,125.00	$4,000.00
Employee Plus Child Maximum Deductible Out of Network	-	$6,250.00	-	$7,100.00	$8,000.00
DOLLAR AMOUNT (monthly) of employee plus spouse premium paid by employer	$813.49	$1,058.65	$1,030.52	$861.36	$854.20
PERCENTAGE (monthly) of employee plus spouse premium paid by employer	87.3%	79.5%	90.0%	85.8%	89.0%
DOLLAR AMOUNT (monthly) of employee plus spouse premium paid by employee	$159.13	$281.92	$114.50	$167.94	$105.86
PERCENTAGE (monthly) of employee plus spouse premium paid by employee	12.7%	20.5%	10.0%	14.2%	11.0%
Employee Plus Spouse Maximum Deductible In Network	$2,391.67	$2,833.33	$4,000.00	$2,722.22	$4,000.00
Employee Plus Spouse Maximum Deductible Out of Network	-	$6,250.00	-	$7,400.00	$8,000.00
DOLLAR AMOUNT (monthly) of employee plus family premium paid by employer	$1,199.60	$1,543.38	$1,477.42	$1,200.07	$1,229.01
PERCENTAGE (monthly) of employee plus family premium paid by employer	91.3%	78.5%	89.0%	79.2%	90.4%
DOLLAR AMOUNT (monthly) of employee plus family premium paid by employee	$159.01	$436.25	$182.60	$594.12	$130.69
PERCENTAGE (monthly) of employee plus family premium paid by employee	8.7%	21.5%	11.0%	20.8%	9.6%
Employee Plus Family Maximum Deductible In Network	$2,475.00	$2,833.33	$4,000.00	$3,350.00	$4,000.00
Employee Plus Family Maximum Deductible Out of Network	-	$6,250.00	-	$10,300.00	$8,000.00

Other Benefits Offerings

Exhibit 3I displays the percentage of responding peers who offer dental insurance and vision plans. The exhibit also highlights the percentages paid and monthly costs to the employer and employee for both individual and family coverage. The City offers dental, as well as 60.0 percent of the responding peers. The City does not offer an employer paid vision plan. Only 30.0 percent of the responding peer organizations offered an employer paid vision plan.

EXHIBIT 3I
DENTAL AND VISION COVERAGE

Dental and Vision Offerings		Peer Percentage Offered	Average Number of Plans Offered	Average maximum monthly amount that the employee pays for employee only coverage	Average maximum monthly amount that the employee pays for employee plus dependent coverage	Average maximum monthly amount the employer pays for employee only coverage	Average maximum monthly amount the employer pays for employee plus dependent coverage
Dental Insurance	Employer Paid	60.0%	2.0	-	-	$108.31	$211.26
	City of Roswell, GA	Yes	2.0	-	-	$29.26	$65.13
	Employee Paid	80.0%	2.0	$24.82	$74.10	-	-
	City of Roswell, GA	Yes	2.0	$10.01	$70.00	-	-
Vision Plan	Employer Paid	30.0%	1.0	-	-	$6.85	$11.09
	City of Roswell, GA	No	1.0	-	-	-	-
	Employee Paid	80.0%	1.2	$5.69	$12.68	-	-
	City of Roswell, GA	Yes	1.0	$6.76	$19.52	-	-

Exhibit 3J displays the percentage of responding peers who offer long-term and short-term disability insurance plans. Employer paid short-term and long-term disability insurance are offered by 80.0 percent of responding peer. Coverage costs and average percentage of salary received for both short- and long-term disability vary widely according to the employee's salary and coverage options.

EXHIBIT 3J
DISABILITY INSURANCE

Disability Insurance		Peer Percentage Offered
Short-Term Disability	Employer Paid	80.0%
	City of Roswell, GA	Yes
	Employee Paid	40.0%
	City of Roswell, GA	No
Long-Term Disability	Employer Paid	80.0%
	City of Roswell, GA	Yes
	Employee Paid	30%
	City of Roswell, GA	No

Exhibit 3K summarizes the Employee Assistance Programs (EAP) offering. EAP is provided by 100.0 percent of responding peers and is also available to employees' families. On average, 3.4 annual visits are offered by peers while the City offers six annual visits.

EXHIBIT 3K
EMPLOYEE ASSISTANCE PROGRAM

EAP	Peer Percentage Yes	Peer Average	City of Roswell, GA
Is an EAP offered?	100.0%	-	Yes
Are benefits available to family members as well as the employee?	100.0%	-	Yes
Number of Annual EAP Visits Provided	-	3.4	6

Exhibit 3L shows tuition reimbursement among peers and the City. Tuition reimbursement for general employees is offered by 70.0 percent of responding peers with an average reimbursement of $2,667 per fiscal year. The City offers tuition reimbursement with a reimbursable limit of $5,250 per fiscal year.

EXHIBIT 3L
TUITION REIMBURSEMENT BENEFITS

Tuition Reimbursement	Peer Percentage Yes	Peer Average	City of Roswell, GA
Is Tuition Reimbursement offered?	70.0%	-	Yes
Tuition Reimbursement Limit	-	$2,666.67	$5,250.00

Life Insurance

Exhibit 3M summarizes the life insurance offerings of responding peers and the City. Employer-paid life insurance is offered by 100.0 percent of the peers as well as the City. The peers, as well as the City, offer the option of additional employee paid life insurance and accidental death insurance is provided to employees.

EXHIBIT 3M
LIFE INSURANCE

Life Insurance	Peer Percentage Yes	Peer Average	City of Roswell, GA
Is employer-paid life insurance offered?	100.0%	-	Yes
Cost (monthly) to employer for individual coverage	-	$12.54	.08 per $1,000
Dollar amount of death benefit	-	$105,000.00	3 X Salary
Is Optional dependent coverage offered?	75.0%	-	Yes
Can the employee purchase (additional) life insurance if desired?	100.0%	-	Yes
Is accidental death insurance provided?	100.0%	-	Yes

Employee Leave and Holidays

Exhibit 3N provides the average accrual rates for personal, sick, annual/vacation, and paid time off leave for both responding peers and the City. Responding peers offer an average minimum monthly accrual rate for sick leave of 6.0 hours and a maximum rate of 8.0. The City's monthly accrual rate for sick leave is 8.0 hours. Peers offer an average minimum monthly accrual rate for paid-time off of 10.0 hours and a maximum rate of 20.0. The City's minimum monthly accrual rate for annual/vacation leave is 8.0 hours and a maximum of 15.0 hours.

EXHIBIT 3N
LEAVE TIME ACCRUAL

Leave Accrual	Organization	Offered?	Minimum Accrual Rate (Monthly)	How many years of service does it require to begin to accrue the minimum rate?	Maximum Accrual Rate (Monthly)	Years to Achieve Maximum Accrual Rate	Maximum Allowed to Roll Over to Following Year
Sick Leave	Peer Percentage Yes/Average	70.0%	6	0	8	6	73.3
	City of Roswell, GA	Yes	8	0	8	-	1,120
Annual/Vacation Leave	Peer Percentage Yes/Average	80.0%	7	1	15	17	267
	City of Roswell, GA	No	-	-	-	-	-
Paid-Time Off	Peer Percentage Yes/Average	20.0%	10	0	20	15	248
	City of Roswell, GA	Yes	8	0	15	10	200

Exhibit 30 summarizes respondents' policies regarding Sick Leave payout. 20.0 percent of responding peer organizations pay out unused sick leave upon voluntary separation. Sick leave is not paid out upon involuntary separation in 100.0 percent of responding peer organizations. Only 50.0 percent of peers counted unused sick leave in calculating retirement. The City does pay out unused sick leave upon both voluntary and involuntary separation. However, the City does not count unused sick leave towards retirement.

EXHIBIT 30
SICK LEAVE PAYOUT

Sick Leave Policies	Peer Percentage Yes	Peer Average	City of Roswell, GA
Is unused sick leave paid out upon voluntary separation?	20.0%	-	Yes
Max hours of sick leave paid out upon voluntary separation	-	240.0	240 hours for retirement eligible
Is unused sick leave paid out upon involuntary separation?	0.0%	-	Yes
Max hours of sick leave paid out upon involuntary separation	-	-	240 hours for retirement eligible
Can unused sick leave count towards retirement?	50.0%	-	No
Max hours of sick leave that can count towards retirement	-	Varies	-

Exhibit 3P summarizes respondents' policies regarding Annual/Vacation Leave payout. Annual/Vacation Leave was paid out by 100.0 percent of respondents for voluntary separation and 66.7 percent for involuntary separation. The City pays out unused annual/vacation leave for both voluntary and involuntary separation.

EXHIBIT 3P
ANNUAL/VACATION LEAVE PAYOUT

Vacation Leave Policies	Peer Percentage Yes	Peer Average	City of Roswell, GA
Is unused annual/vacation leave paid out upon voluntary separation?	100.0%	-	Yes
Max hours of annual/vacation leave paid out upon voluntary separation	-	282.9	after 6 months of service
Is unused annual/vacation leave paid out upon involuntary separation?	66.7%	-	Yes
Max hours of annual/vacation leave paid out upon involuntary separation	-	290.0	after 6 months of service

The percentages of peers offering various holidays and the holidays at the City are shown in **Exhibit 3Q.** All peers recognize Memorial Day, Independence Day, Labor Day, and Thanksgiving Day, and the Day after Thanksgiving. The City offers 11 paid holidays each year while the peer average is 11 too.

EXHIBIT 3Q
RECOGNIZED HOLIDAYS

Paid Holiday observed by peer organizations	Peer Percentage Yes	City of Roswell, GA
New Year's Day	80.0%	Yes
New Year's Eve	20.0%	No
Martin Luther King, Jr. Day	90.0%	Yes
Lincoln's Birthday	0.0%	No
Washington's Birthday	0.0%	No
Presidents Day	10.0%	Yes
Good Friday	40.0%	No
Memorial Day	100.0%	Yes
Independence Day	100.0%	Yes
Labor Day	100.0%	Yes
Veteran's Day	40.0%	Yes
Thanksgiving Day	100.0%	Yes
Day after Thanksgiving	100.0%	Yes
Christmas Eve	90.0%	No
Christmas Day	100.0%	Yes
Personal Holiday	60.0%	Yes
Employee Birthday	0.0%	No
Other	20.0%	No
Holiday Policies	**Peer Total/Percentage Yes**	**City of Roswell, GA**
Total Number of holidays observed (include breaks and other special days off not included as annual, sick, or personal leave)	11	11

Exhibit 3R provides a summary of other types of compensation. Of the responding peers, 20.0 percent offer longevity pay, 80.0 percent offer merit raises, 20.0 percent offer merit bonuses, and 60.0 percent provide some other compensation program. The City offers Merit Raises and a signing bonus for Police.

EXHIBIT 3R
COMPENSATION

Types of longevity pay, bonuses, or incentive pay programs.	Peer Percentage Yes	City of Roswell, GA
Does your organization offer: Longevity Pay?	20.0%	No
Does your organization offer: Merit Raises?	80.0%	Yes
Does your organization offer: Merit Bonuses?	20.0%	No
Does your organization offer: other programs?	60.0%	Yes (Police $2,000 signing bonus)

Retirement Benefits

Exhibit 3S displays whether or not peers and the City participate in the state retirement system and options other than the state plan. Of the peer respondents, 90.0 percent participate in a retirement system other than a state retirement plan, and, of these peers, 100.0 percent offer a 401k, 401a, 403(b), or 457. The City does participate in a state plan and also offers a 401k, 401a, 403(b), or 457. Participation in the latter group of plans is consistent with the majority of the responding peer organizations.

EXHIBIT 3S
RETIREMENT PARTICIPATION

Retirement Participation	Peer Percentage Yes	City of Roswell, GA
Does the organization participate in a State Retirement System?	10.0%	Yes
Is a retirement option other than a state plan offered?	90.0%	Yes
Is D.R.O.P. offered?	0.0%	No
Is a 401k, 401a, 403(b), or 457 offered?	100.0%	Yes
Is a type of plan other than a 401k, 401a, 403(b) or 457 offered?	10.0%	No
Does the employer contribute to any of these non-state retirement options?	0.0%	Yes

Exhibit 3T provides more information about the organizations' retirement plans. The number of years to fully vest for peer employees (5.7 years) is similar to the City's requirement (5 years). Neither a peer nor the City provide a COLA to retiree pensions. The City provides a much greater percentage of employees' salaries to the retirement options than the peer organizations.

EXHIBIT 3T
RETIREMENT DETAILS

Retirement Details	Peer Average	City of Roswell, GA
Years to Fully Vest	5.7	5
COLA Offered to Retiree Pensions	0.0%	No
Does the organization's retirement plan offer a disability provision?	66.7%	Yes for the Defined Benefit Plan; No for the Defined Contribution Plan
What percent of salary does the organization contribute to this retirement option?	4.4%	15.1% for the Defined Benefit Plan; 10.0% for the Defined Contribution Plan
What percent of salary does the employee contribute to this retirement option?	2.9%	0.0% for the Defined Benefit Plan; 0 to 5% for the Defined Contribution Plan

Exhibit 3U summarizes respondents' answers to insurance offerings for retired employees. The City does not offer health, dental, or life insurance to retired employees. No peer offers dental insurance to retirees; however, 40.0 percent offer health insurance to retirees, and 20.0 percent offer life insurance.

EXHIBIT 3U
RETIREMENT INSURANCE

Insurance for Retirees	Peer Average	City of Roswell, GA
Does your organization offer health insurance to retired employees?	-	-
Health Insurance	40.0%	No
Dental Insurance	0.0%	No
Life Insurance	20.0%	No

3.5   BENEFITS SURVEY SUMMARY

The peer benefits data summarized in this chapter indicate that the City has a highly competitive benefits package for City employees. The City may choose to consider making some adjustments to benefits offerings, however, when considered in total, the benefits for employees are very competitive.

3.6   MARKET SUMMARY

This analysis provided a comparison of the City's current compensation structure, to the current market peer data. Some classifications had ranges that were ahead of the market while some were well behind. Overall, when comparing the public sector data at the desired position in the market, the City's current structure was similar to its peers. The City's benefits were found to be very competitive. All study recommendations are discussed in **Chapter 4** of this report.

Chapter 4 – Recommendations

The analysis of the City's total compensation system of salary and benefits revealed several areas of opportunities for improvement. Evergreen Solutions focused specifically on developing a system that should remain competitive for several years with some maintenance by the Human Resources staff. These recommendations, as well as the findings that led to each, are presented in this chapter.

4.1   COMPENSATION

The compensation analysis consisted of an external market assessment. During this assessment, the City's pay ranges for selected benchmark classifications were compared to average pay ranges offered in the identified market. Overall, the City's salary ranges were below market peers at the minimum, midpoint and maximum of the desired market position of the 50th percentile. Details of the external market assessment were discussed in **Chapter 3** of this report.

FINDING:

The City's salary ranges were behind market for a number of the benchmarked classifications indicating a need for revision to the pay plan structure to remain competitive.

RECOMMENDATION 1: Create a new pay structure for the City that reflects market conditions and best practices; slot all classifications into the updated pay structure based on external and internal equity; and transition employees' salaries into the structure.

Exhibit 4A shows the new proposed pay plan which has 25 open range pay grades, numbered 501 through 525. The range spreads of the pay grades remain a consistent 60.0 percent through the pay structure.

EXHIBIT 4A
PROPOSED PAY PLAN

Grade	Minimum	Midpoint	Maximum	Range Spread
501	$ 22,500.00	$ 29,250.00	$ 36,000.00	60.0%
502	$ 24,300.00	$ 31,590.00	$ 38,880.00	60.0%
503	$ 26,244.00	$ 34,117.00	$ 41,990.00	60.0%
504	$ 28,344.00	$ 36,847.00	$ 45,350.00	60.0%
505	$ 30,612.00	$ 39,796.00	$ 48,979.00	60.0%
506	$ 33,061.00	$ 42,980.00	$ 52,898.00	60.0%
507	$ 35,706.00	$ 46,418.00	$ 57,130.00	60.0%
508	$ 38,562.00	$ 50,131.00	$ 61,699.00	60.0%
509	$ 41,647.00	$ 54,141.00	$ 66,635.00	60.0%
510	$ 44,979.00	$ 58,473.00	$ 71,966.00	60.0%
511	$ 48,577.00	$ 63,150.00	$ 77,723.00	60.0%
512	$ 52,463.00	$ 68,202.00	$ 83,941.00	60.0%
513	$ 56,660.00	$ 73,658.00	$ 90,656.00	60.0%
514	$ 61,193.00	$ 79,551.00	$ 97,909.00	60.0%
515	$ 66,088.00	$ 85,915.00	$105,741.00	60.0%
516	$ 70,152.00	$ 91,198.00	$112,243.00	60.0%
517	$ 74,466.00	$ 96,806.00	$119,146.00	60.0%
518	$ 79,046.00	$102,760.00	$126,474.00	60.0%
519	$ 83,907.00	$109,079.00	$134,251.00	60.0%
520	$ 89,067.00	$115,787.00	$142,507.00	60.0%
521	$ 94,545.00	$122,909.00	$151,272.00	60.0%
522	$100,360.00	$130,468.00	$160,576.00	60.0%
523	$106,532.00	$138,492.00	$170,451.00	60.0%
524	$113,084.00	$147,009.00	$180,934.00	60.0%
525	$120,039.00	$156,051.00	$192,062.00	60.0%

After developing the new pay plan, Evergreen Solutions slotted each City classification into the appropriate pay range in the pay plan. Assigning pay grades to classifications requires a balance of internal equity, desired market position, and recruitment and retention issues all play a role in that process. Thus market range data shown in **Chapter 4** were not the sole criteria for the proposed pay ranges. Some classifications' grade assignments varied from their associated market range due to the other factors mentioned above. The internal assessment took into consideration the type of work being performed by each classification. The resulting recommended pay grades for each of the studied classifications are shown in **Exhibit 4B**.

EXHIBIT 4B
PROPOSED PAY GRADES

Class Title	Proposed Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum
CUSTODIAN	501	$ 22,500.00	$ 29,250.00	$ 36,000.00
REFUSE COLLECTOR	502	$ 24,300.00	$ 31,590.00	$ 38,880.00
CREW WORKER EQUIPMENT OPERATOR I	503	$ 26,244.00	$ 34,117.00	$ 41,990.00
ADMINISTRATIVE SPECIALIST I BUILDING OPERATIONS TECH I EQUIPMENT OPERATOR II FLEET MECHANIC I LANDSCAPE SPECIALIST METER TECHNICIAN SMALL ENGINE TECHNICIAN TRUCK DRIVER/RESIDENTIAL I	504	$ 28,344.00	$ 36,847.00	$ 45,350.00
ADMINISTRATIVE SPECIALIST II BLDG OPS ADM TECH EQUIPMENT OPERATOR III FIELD SERVICES REPRESENTATIVE FINANCIAL SERVICE REP I INVENTORY CONTROL SPECIALIST LANDSCAPE SPECIALIST II TRAFFIC OPERATIONS TECH I TRAFFIC SIGNAL TECHNICIAL TRUCK DRIVER RESIDENTIAL II TRUCK DRIVER/COMMERCIAL I	505	$ 30,612.00	$ 39,796.00	$ 48,979.00
ACCOUNTING SPECIALIST I ADMINISTRATIVE ASSISTANT CREW LEADER FINANCIAL SERVICE REP II FLEET MECHANIC II TRAFFIC ANALYST I TRAFFIC OPERATIONS TECH II TRUCK DRIVER COMMERICAL II WATER PLANT OPERATOR I	506	$ 33,061.00	$ 42,980.00	$ 52,898.00
ACCOUNTING SPECIALIST II BLDG OPS COORDINATOR BUILDING OP TECH SUPERVISOR BUYER I DRAINAGE SYSTEM INVESTIGATOR ENGINEERING TECHNICIAN GIS TECHNICIAN LAND DEVELOPMENT INSPECTOR I MARKETING SUPERVISOR PERMIT TECHNICIAN RECORDS COORDINATOR SIGNS & MARKINGS SUPERVISOR STREETS & HIGHWAY INSPECTOR TRAFFIC SIGNAL ELECTRICIAN	507	$ 35,706.00	$ 46,418.00	$ 57,130.00

EXHIBIT 4B (CONTINUED)
PROPOSED PAY GRADES

Class Title	Proposed Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum
CREW SUPERVISOR DIGITAL MEDIA DESIGNER ENVIRONMENTAL COMPLIANCE OFFCR EXECUTIVE ASSISTANT LAND DEVELOPMENT INSPECTOR II PARALEGAL PLANNER I PROBATION OFFICER R&P PROGRAM SUPERVISOR I SPECIAL EVENT VOLUNTEER COORD WATER PLANT OPERATOR II	508	$ 38,562.00	$ 50,131.00	$ 61,699.00
ADMINISTRATIVE SUPERVISOR ENGINEERING COORDINATOR ENVIRONMENTAL EDUCATION COORD GRANTS SPECIALIST LAND DEVELOPMENT INSPECTOR III PC/APPLICATIONS SPECIALIST PLANNER II PLANS REVIEWER R&P PROGRAM SUPERVISOR II RECYCLING CENTER SUPERVISOR SANITATION SUPERVISOR STORMWATER CONSTRUCTION SPEC STORMWATER MAINT SUPV TRAFFIC ANALYST II TRAFFIC SIGNALS SUPERVISOR UTILITY COORDINATOR WATER DISTRIBUTION SUPERVISOR WATER PLANT OPERATOR III WORKERS COMP COORDINATOR	509	$ 41,647.00	$ 54,141.00	$ 66,635.00
ACCOUNTANT ASSISTANT WATER OPERATIONS MANAGER BUDGET ANALYST COMMUNITY RELATIONS COORD CULTURAL ARTS CENTER COORDINTR DEPUTY CITY CLERK FACILITIES MAINTENANCE SUPV FINANCIAL COORDINATOR FLEET MAINTENANCE SUPERVISOR FLEET SERVICES MANAGER GIS ANALYST HISTORIC SITE COORDINATOR INTERNAL COMMUNICATIONS MANAGE LANDSCAPE ARCHITECT (R&P) PAYROLL MANAGER SPECIAL EVENTS MANAGER STREET MAINTENANCE SUPERVISOR TREASURY ANALYST	510	$ 44,979.00	$ 58,473.00	$ 71,966.00

EXHIBIT 4B (CONTINUED)
PROPOSED PAY GRADES

Class Title	Proposed Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum
BUDGET COORDINATOR EMPLOYMENT/STAFFING MANAGER LANDSCAPE ARCHITECT (COMMDEV) PARKS COORDINATOR PLANNER III PROJECT COORDINATOR R&P AREA COORDINATOR STREET CONSTRUCTION SUPERVISOR TRAFFIC OPERATIONS MANAGER TRANSPORTATION PLANNER III WEB DEVELOPER/GRAPHIC DESIGNER	511	$ 48,577.00	$ 63,150.00	$ 77,723.00
APPLICATION SPECIALIST BENEFITS MANAGER EMPLOYEE RELATIONS MANAGER ENVIRONMENTAL PROGRAMS MNGR FINANCIAL SERVICES MANAGER GIS MANAGER GRANTS MANAGER HRIS MANAGER MANAGER OF CULTURAL SERVICES RECREATION SERVICES MANAGER SIGNAL SYSTEMS MANAGER SUPPORT SERVICES MANAGER	512	$ 52,463.00	$ 68,202.00	$ 83,941.00
ADMINISTRATIVE SERVICES MANAGER ATHLETICS SERVICES MANAGER COMMUNITY FACILITIES SRVC MGR NETWORK ADMINISTRATOR PUBLIC WORKS SUPERINTENDENT STORMWATER UTILITY MANAGER WATER OPERATIONS MANAGER WATER UTILITY MANAGER	513	$ 56,660.00	$ 73,658.00	$ 90,656.00
ACCOUNTING MANAGER BUDGET MANAGER BUILDING OPERATIONS MANAGER CITY CLERK CITY TRAFFIC ENGINEER COMMUNITY RELATIONS MANAGER CONSTRUCTION/MAINTENANCE MGR CONTRACT MANAGER ENGINEERING DESIGN MANAGER IT MANAGER LAND DEVELOPMENT MANAGER PARK SERVICES MANAGER RISK MANAGER SOLICITOR SR. TRANSPORTATION ENGINEER TRANSPORTATION PLANNING MNGR WATER RESOURCES ENGINEER	514	$ 61,193.00	$ 79,551.00	$ 97,909.00

EXHIBIT 4B (CONTINUED)
PROPOSED PAY GRADES

Class Title	Proposed Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum
ASSISTANT CITY ATTORNEY DEPUTY DIRECTOR OF OPS R&P PLANNING & ZONING DIRECTOR SENIOR TECHNICAL ANALYST	515	$ 66,088.00	$ 85,915.00	$105,741.00
CITY ENGINEER DEPUTY DIRECTOR COMMUNITY DEV DEPUTY DIRECTOR FINANCE/TREAS DEPUTY DIRECTOR TRANSPORTATION DEPUTY ENVIR/PUBLIC WORKS DIR	516	$ 70,152.00	$ 91,198.00	$112,243.00
DIRECTOR OF IT HUMAN RESOURCES DIRECTOR	519	$ 83,907.00	$109,079.00	$134,251.00
COMMUNITY DEVELOPMENT DIRECTOR ENVIRONMENTAL/PW DIRECTOR FINANCE DIRECTOR RECREATION & PARKS DIRECTOR TRANSPORTATION DIRECTOR	520	$ 89,067.00	$115,787.00	$142,507.00
CITY ATTORNEY DEPUTY CITY ADMINISTRATOR	522	$100,360.00	$130,468.00	$160,576.00
CITY ADMINISTRATOR	525	$120,039.00	$156,051.00	$192,062.00

In addition to ensuring internal equity and helping to alleviate concerns with recruitment and retention, the proposed pay grade assignments will improve the City's desired market position. **Exhibit 4C** shows the overall average percent difference from market for the benchmarked classifications at the time of the study, and displays the same in the event that the proposed pay structure is implemented.

EXHIBIT 4C
OVERALL MARKET DIFFERENTIAL COMPARISON

Comparison	Overall % Difference at Minimum	Overall % Difference at Midpoint	Overall % Difference at Maximum
Current Pay Grades	-3.3%	0.1%	1.2%
Proposed Pay Grades	2.1%	5.3%	6.4%

As the exhibit shows, the proposed pay grades significantly improve the overall average differentials for the City's benchmarked classifications, bringing the City's benchmarked classifications from below market to the desired market competitive position. If the new structure is implemented, the City's pay plan, overall, will be competitive with its peers.

After assigning pay grades to classifications, the next phase of implementing the compensation structure is to transition current employees' salaries into the new pay plan. This is done by establishing a method of calculating salaries in the new pay grades and determining whether an adjustment is necessary to individual employee salaries to bring them to their calculated salary. Evergreen Solutions approached this transition by calculating employee salaries for placement in the new structure utilizing two steps.

Step 1: Bring Employee Salaries to New Minimums

In this step, each employee's current salary was compared to the minimum of his or her proposed classification's pay grade. If an employee's current salary was below his or her new grade minimum, an adjustment was proposed to raise the individual's salary to the minimum. If the employee's current salary was already above his or her grade minimum, no adjustment was recommended.

With this step, salary adjustments are recommended for 47 City employees, with an approximate annualized cost of **$62,357.** The approximate cost is for salary adjustments only and does not include the associated cost for employee benefits.

Step 2: Current Range Penetration

The next step, after determining if an employee's salary is already above the minimum of his or her classification's proposed pay range, was to adjust the salary to the same relative position in the proposed pay structure (range). For example, if an employee's salary is 40.0 percent of the way through their current pay range, the salary was adjusted to the 40.0 percent mark of the proposed range.

For this step, additional salary adjustments are recommended for 336 City employees, with an approximate annualized cost of **$768,525.** Again, this is the approximate cost for salary adjustments only and does not include the associated cost for employee benefits.

4.2   BENEFITS

The benefits review and comparison was conducted utilizing a client specific survey tool. Benefits offerings, like compensation plans can change, therefore the review represents a snapshot in time of what is offered by peer organizations. Again, while line by line comparison data was provided, it should be noted again that organizations often have different philosophies regarding the importance of specific benefits and subsequently those offerings. Furthermore, benefits are usually negotiated and acquired through third parties, which often makes individual comparisons even more difficult.

FINDING:

The benefits data comparison revealed that the City has a competitive benefits package. The City's benefits as a percentage of total compensation is comparable to the data collected from peers and provides its employees with similar benefits.

RECOMMENDATION 2: Areas where the City may consider changes to its current benefits package include allowing some amount of sick leave to count towards retirement, and providing more paid time off.

4.3   SYSTEM ADMINISTRATION

The City's compensation system will need periodic maintenance. The recommendations provided to improve the competiveness of the compensation system were developed based on conditions at the time the data were collected. Without proper upkeep, the potential for recruitment and retention issues may increase as the compensation system becomes dated and less competitive.

FINDING:

The salary survey results indicated that the City's pay plans for identified classifications were relatively competitive at the desired market position. However, as discovered during this survey, the pay plans required some adjustment.

RECOMMENDATION 3: 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.

While it is unlikely that the pay plan as a whole will need to be adjusted for several years, a small number of classifications' pay grades may need to be reassigned more frequently. If one or more classifications are exhibiting high turnover or are having difficulty with recruitment, the City should collect salary range data from peer organizations to determine whether an adjustment is needed for the pay grade of the classification(s).

RECOMMENDATION 4: Conduct a comprehensive classification and compensation study every three to five years.

Small-scale salary surveys can improve the market position of specific classifications, but it is recommended that a full classification and compensation study be conducted every three to five years to preserve both internal and external equity for the City. Changes to classification and compensation do occur, and while the increments of change may seem minor, they can compound over time. A failure to react to these changes quickly has the potential to place the City in a challenging position for recruiting and retaining quality employees.

4.4   PAY PRACTICES

While the previous two recommendations are intended to maintain the competitiveness over time of particular classifications and the compensation structure as a whole, it is also necessary to continue to review, evaluate and as appropriate, update the City's associated pay practices.

FINDING:

The City's current pay practices overall are within today's standards for best practices in these areas.

RECOMMENDATION 5: Continue to administer equitable practices for establishing and progressing employee salaries through the pay ranges including determining salaries of: newly hired employees; employees who have been promoted, demoted, or transferred to a different classification or department; work out of classification; or reached the maximum salary of their classification's assigned pay range.

New Hires

A new employee's starting salary largely depends on the amount of education and experience the employee possesses beyond the minimum requirements for the job. Typically, an employee holding only the minimum education and experience requirements for a classification is hired at or near the classification's pay grade minimum. An upper limit to the percentage above minimum that can be offered to a new employee with only the minimum requirements should be established, where approval is needed to offer a starting salary that is a higher percentage above minimum. Another threshold should be established as the maximum starting salary possible without approval for new employees with considerable experience and/or education above the requirements for the position. It is common for the midpoint to be used as the maximum starting salary. All starting salaries should take into consideration internal equity, meaning that determining a new hire salary should be done with consideration of existing employee salaries with similar levels of education and experience in the classification.

Salary Progression

The method of salary progression through pay ranges largely on an organization's compensation philosophy. The City's current merit increase policy and eligibility requirements are consistent with its' established compensation philosophy of rewarding, or progressing pay based individual employee performance. However, in order for a merit pay system to work effectively, a fair, organization-wide performance evaluation system must be administered, and supervisors and management should receive proper and perhaps periodic training to ensure equitable administration of the process.

Promotions

While it is common for organizations like the City, to establish a percentage salary increases that depend on the increase in pay grade as a result of the promotion, this practice may also produce undesired results in that internal salary equity of classification may be disrupted. Rather, the City may consider establishing a percentage range, ensure that the employee's new salary be within the new pay grade's range, and internal equity of salaries be considered when establishing the employee's individual increase percentage.

Transfers

The City's current policy for transferred employees is appropriate in that an employee's salary should remain the same.

4.5   SUMMARY

The recommendations in this chapter establish a competitive pay system for the classifications included in this study, externally and internally equitable pay grade assignments, and system administration practices that will provide the City with a responsive compensation system for years to come. While the upkeep of this recommended system will require work, the City will find that having a competitive compensation system that enables strong recruitment and encourages employee retention is well worth this commitment.

Consulting Services Agreement
DRAFT

By and Between

City of Gainesville

and

Evergreen Solutions, LLC

This Agreement (the "Agreement"), dated as of INSERT DATE, is made by and between Evergreen Solutions, LLC, a Florida corporation ("Evergreen"), and the City of Gainesville (the "Client").

WHEREAS, Evergreen Solutions and the Client desire to enter into an agreement whereby Evergreen will provide certain human resources management consulting services for the Client on the terms and conditions hereinafter set forth; and

WHEREAS, Evergreen Solutions is willing to provide such human resources management consulting services for the Client.

NOW, THEREFORE, the parties hereto agree as follows:

1. Engagement. Evergreen Solutions hereby agrees to provide such human resources management consulting services for the Client as may be reasonably requested by the Client in connection with the Request for Proposal and Proposal submitted by Evergreen Solutions on November 30, 2017.

2. Extent of Services. Evergreen Solutions agrees to perform such services to the best of its ability and in a diligent and conscientious manner and to devote appropriate time, energies and skill to those duties called for hereunder during the term of this Agreement and in connection with the performance of such duties to act in a manner consistent with the primary objective of completing the engagement. Evergreen Solutions agrees to devote such time as is reasonably required to fulfill its duties hereunder.

Throughout the duration of this agreement, Evergreen Solutions will serve as an independent contractor of the Client, As such; Evergreen Solutions will obey all laws relating to federal and state income taxes, associated payroll and business taxes, licenses and fees, workers compensation insurance, and all other applicable state and federal laws and regulations.

In the successful completion of this engagement, Evergreen Solutions may utilize subcontractors, but Evergreen Solutions shall remain completely responsible to the Client for performance under this Agreement.

3. Term. The engagement of the Consultant hereunder by Client shall commence as of the date hereof and shall continue through ENTER COMPLETION DATE, unless earlier terminated pursuant to Section 6 hereof.

4. Compensation.

(a) As compensation for the services contemplated herein and for performance rendered by Evergreen Solutions of its duties and obligations hereunder, the Client shall pay to Evergreen Solutions an aggregate fee equal to $28,000 (the "Consulting Fee"), earned and payable according to the following invoice/payment schedule:

- 33% following completion of Tasks 1 - 2 of our detailed work plan
- 33% following completion of Tasks 3 - 5 of our detailed work plan
- 34% following completion of Tasks 6 - 8 of our detailed work plan

(b) The Client's sole obligation shall be to pay Evergreen Solutions the amounts described in Section 4(a) of this Agreement, and the Consultant is not and shall not be deemed an employee of the Client for any purpose.

5. Reimbursement for Expenses.

The contract price indicated in section 4 of this agreement is inclusive of all expenses borne by Evergreen Solutions and therefore no expenses shall be reimbursed to Evergreen Solutions by the Client for the duration of this agreement.

6. Termination. This Agreement shall be terminated as follows:

(a) 30 days after written notice of termination is given by either party at any time after INSERT DATE, provided however, that if the Client shall terminate this Agreement pursuant to this Section 6(a) for any reason other than Consultant's material breach of this Agreement (having given prior notice of, and reasonable opportunity for Consultant to cure, any such breach), Client shall pay to consultant in one lump sum an amount equal to that portion of the aggregate Consulting Fee which has not been paid to Consultant as of the effective date of such termination.

(b) On such date as is mutually agreed by the parties in writing.

(c) Upon expiration of the Term as set forth in Section 3.

If Client elects to terminate for material breach then Client shall pay to consultant in one lump sum an amount equal only to that for which services have been rendered.

Upon termination of this Agreement pursuant to this Section 6, except as contemplated by Section 6(a) in the event Client terminates this Agreement in the absence of continuing material breach hereof by Consultant, Consultant shall be entitled to payment of only that portion of the Consulting Fee earned through the effective date of such termination and any portion of the Lump Sum Payment which has not been paid to Consultant as of the effective date of such termination.

7. Confidential Information. Evergreen Solutions shall not, at any time during or following expiration or termination of its engagement hereunder (regardless of the manner, reason, time or cause thereof) directly or indirectly disclose or furnish to any person not entitled to receive the same for the immediate benefit of the Client any trade secrets or confidential information as determined by the Client in writing.

8. Covenants. Evergreen Solutions agrees to (a) faithfully and diligently do and perform the acts and duties required in connection with its engagement hereunder, and (b) not engage in any activity which is or likely is contrary to the welfare, interest or benefit of the business now or hereafter conducted by the Client.

9. Binding Effect. This Agreement will inure to the benefit of and shall be binding upon the parties hereto and their respective successors or assigns (whether resulting from any re organization, consolidation or merger of either of the parties or any assignment to a business to which all or substantially all of the assets of either party are sold).

10. Entire Agreement. This Agreement, including the aforementioned RFP and proposal, contains the entire agreement and understanding of the parties with respect to the subject matter hereof, supersedes all prior agreements and understandings with respect thereto and cannot be modified, amended, waived or terminated, in whole or in part, except in writing signed by the party to be charged.

11. Construction. While the parties hereto believe that the terms hereof are fair, reasonable and enforceable in all respects, it is agreed that any provision of this Agreement which is held to be prohibited or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such prohibition or unenforceability without invalidating the remaining provisions hereof, and any such prohibition or unenforceability in any jurisdiction shall not invalidate or render unenforceable such provision in any other jurisdiction. In addition to any other remedy which Client may have at law or in equity, Client shall be entitled to injunctive relief for a breach of Sections 7 and 8 (b) of this Agreement by the Consultant.

12. Notices. All notices required to be given under the terms of this Agreement or which any of the parties desires to give hereunder shall be in writing and personally delivered or sent by registered or certified mail, return receipt requested, or sent by facsimile transmission, addressed as follows:

    (a.) If to Evergreen Solutions addressed to:

Evergreen Solutions, LLC
Attention: Dr. Jeff Ling, Executive Vice President
2878 Remington Green Circle
Tallahassee, Florida 32308

    (b.) If to the Client addressed to:

City of Gainesville
Attention: Ms. Gayle Dykeman, General Government Procurement Division
200 East University Avenue, Room 339
Gainesville, Florida 32601

Any party may designate a change of address at any time by giving written notice thereof to the other parties.

13. Miscellaneous. This Agreement:

(a) shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns;

(b) may not (except as provided in Section 9 hereof) be assigned by either party hereto without the prior written consent of the other party (any purported assignment hereof in violation of this provision being null and void);

(c) may be executed in any number of counterparts, and by any party on separate counterparts, each of which as so executed and delivered shall be deemed an original but all of which together shall constitute one and the same instrument, and it shall not be necessary in making proof of this Agreement as to any party hereto to produce or account for more than one such counterpart executed and delivered by such party;

(d) may be amended, modified or supplemented only by a written instrument executed by all of the parties hereto; and

(e) embodies the entire agreement and understanding of the parties hereto in respect of the transactions contemplated hereby and supersedes all prior agreements and understandings among the parties with respect thereto.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first above written.

Evergreen Solutions, LLC

Jeff Ling, Executive Vice President

City of Gainesville

Enter Client Signatory Name and Title