A Cost Proposal to Conduct a Compensation Study for the City of Sandersville, GA

ORIGINAL

Evergreen Solutions, LLC

July 1, 2024

Cost Proposal

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Compensation Study for the City of Sandersville. We are committed to providing the highest quality consulting services to our client partners for a reasonable cost. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 3.2** of our proposal is **$29,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two onsite visits to the City to perform the requested work as most of the work can be conducted virtually. Evergreen Solutions charges an hourly fee of $150 per hour when factoring in our all-inclusive cost to perform the services being requested. **Our cost proposal is valid until November 15, 2024.**

Note: Evergreen cost is based on completing the following two phases of the study:

- Phase I – Classification (i.e., Tasks 1, 3, 4, and 11) - **$10,500**
- Phase II – Compensation (i.e., Tasks 1, 2, 5, 6, 7, 8, 9, and 10) - **$19,000**

Our preferred payment schedule for all tasks is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 40% - upon completion of Tasks 5 – 8
- 10% - upon completion of Tasks 9 – 11

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the City of Sandersville wishes to identify.

Company	Phase 1 Score	Pricing Score	Phase 2 Score	Reference Score	Final Score	Price	Comments
Evergreen	59	23	82	7	89	$ 29,500	True all-in cost (w/ two on-site visits and job description updates included)
MGT	60	19	79	9	88	$ 19,890	Pricing doesn't include travel costs. Job description updates additional $250 each (as needed). One year of support services included.
MAG	58	19	77	8	85	$ 24,900	Cost is an **estimate only** but Job Description updates included.
McGrath	58	12	70			$ 38,275	Pricing doesn't include job description costs ($200 per update)
Gallagher	54	10	64			$ 38,500	Pricing doesn't include job description costs ($550 per update!)
AutoSolve	51	16	67			$ 32,265	All-in (may have reasonable expenses) with one on-site visit for final presentation. Option add-on of annual maintenance at $6k first year and $12k second year. End of year 1, another market
Bolton	46					$ 29,500	Disqualified - failed to provide pricing in separate document. Also low-scoring comparatively.
SGR	42					$ 32,875	Travel costs additional. No GA experience identified in proposal.
JER	42					$ 41,950	Doesn't seem to provide opportunity for employee input. Highest cost proposal.
ABD	19					$ 10,000	Eliminated - zero confidence in final product based on proposal

Phase 1 Elimination
Phase 2 Elimination

A Proposal to Conduct a Compensation Study for the City of Sandersville, GA

ORIGINAL

Evergreen Solutions, LLC

July 1, 2024

Response to Request for Proposals

Evergreen Solutions is well qualified to conduct a Compensation Study for the City of Sandersville due to our experience in conducting more than 1,300 similar studies for local governments and other public sector organizations across the country, especially in the State of Georgia. As required in the Request for Proposals (RFP), our response is no more than 12 pages, excluding separate cost documentation. We have provided the following sections in our response: 1) General Requirements; 2) Firm's Qualifications; and 3) Proposed Methodology and Related Information

1. General Requiremennts

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

Evergreen Solutions was formed in 2004 as a limited liability company to provide a modern, practical alternative to the typical consulting options. The firm is made up of management and human resource professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal. Evergreen's philosophy is based on an understanding that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Evergreen employs 29 full-time and nine part-time employees who provide a variety of human resource management consulting. Evergreen provides a broad variety of services, including, but not limited to: compensation studies; classification studies; salary and benefits studies; performance appraisal reviews; workload analyses; staffing studies; disparity studies; training assessments; and strategic planning.

Collectively, the members of the Evergreen Solutions Team have: extensive experience in conducting compensation studies for local governments and other public sector organizations throughout the country, including many in the State of Georgia; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant Georgia statutes and regulations as well as federal regulations; objectivity and flexibility due to the fact that we have no vested interests; and specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 47 states throughout the country. **Exhibit 1** includes a list of the public sector clients in the State of Georgia that Evergreen has worked with, or is currently on contract to work with, in providing work similar in scope to the services being requested.

2. Firms' Qualifications

In this section, we provide you with four similar projects we have conducted for local governments as well as the qualifications of our proposed project team through <u>summary resumes</u>. Detailed resumes are available upon request. Evergreen will not be utilizing any subcontractors.

2.1 References

We have provided the following four references that we feel demonstrate our recent experience as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

Exhibit 1: Georgia Clients

Atlanta Metropolitan College	City of Garden City	City of Villa Rica
Atlanta Public Schools	City of Griffin	City of Woodstock
Barrow County	City of Hampton	Cobb County
Bibb County School District	City of Jackson	Cobb County – Marietta Water Authority
Brunswick-Glynn Joint Water & Sewer	City of Johns Creek	Columbus Consolidated Government
Cherokee County	City of Kennesaw	DeKalb County Public Schools
City of Albany	City of Kingsland	Douglas County
City of Alpharetta	City of Marietta/Board of Lights & Water	Douglas County Schools
City of Atlanta	City of McDonough	Douglasville-Douglas Co. Water & Sewer Authority
City of Brookhaven	City of Milton	Effingham County
City of Calhoun	City of Norcross	Forsyth County
City of Cedartown	City of Powder Springs	Forsyth County Public Library
City of Chamblee	City of Rome	Habersham County
City of Commerce	City of Roswell	Henry County
City of Dahlonega	City of Sandy Springs	Henry County Public Schools
City of Dalton	City of Savannah	Live Oak Public Libraries
City of Douglasville	City of South Fulton	Lumpkin County
City of Dublin	City of Statesboro	Lumpkin Co Water & Sewerage Authority
City of Duluth	City of Stockbridge	Madison County
City of Dunwoody	City of Suwanee	Spalding County
City of Fairburn	City of Sylvester	Savannah-Chatham Co Public School System
City of East Point	City of Thomasville	Sumter County Schools
City of Fayetteville	City of Tybee Island	Worth County
City of Forest Park	City of Vienna	
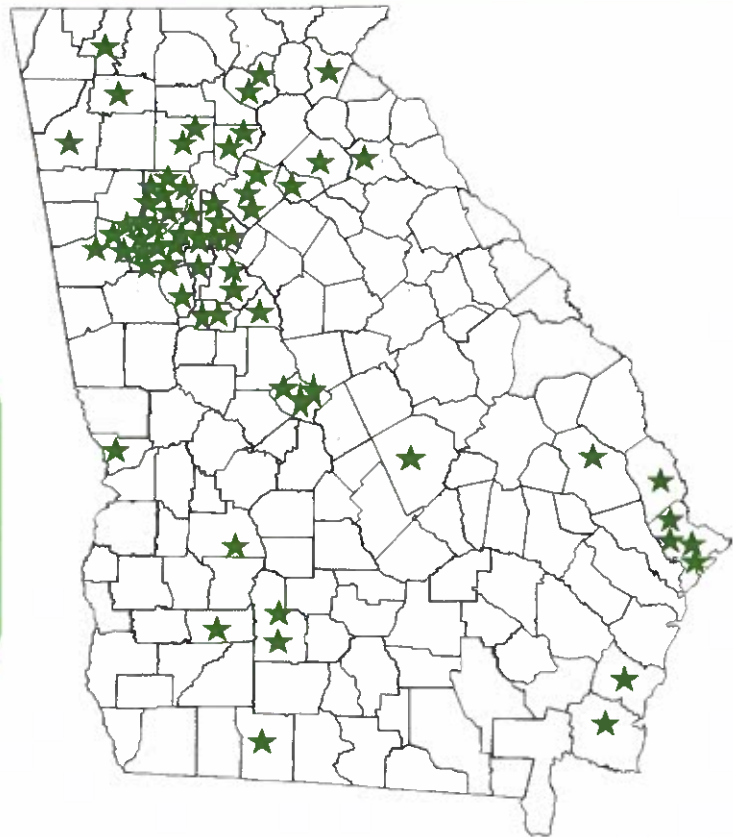
OVER *65* GEORGIA CLIENTS AND OVER *1300* NATIONWIDE

Classification and Compensation Study - City of Jackson, Georgia
Contact Information: Holly Bailey, Director of Finance and Administration, 134 S. Oak Street, Jackson, Georgia 30233, (770) 775-7535, holly.bailey@cityofjacksonga.com

Classification and Compensation Study - City of Calhoun, Georgia
Contact Information: Paul Worley, MPA, City Administrator, 226 S. Wall Street, Calhoun, Georgia 30701, (706) 602-5503, pworley@calnet-ga.net,

Position Classification and Compensation/Benefits Study and Analysis - City of Kennesaw, Georgia
Contact Information: Brian Acker, Director, Human Resources, 2529 J.O. Stephenson Avenue, Kennesaw, Georgia 30144, (770) 429-4530, backer@kennesaw-ga.gov

Classification and Compensation Study - City of Vienna, Georgia
Contact Information: Margaret Shelley, City Clerk, 107 West Cotton Street, Vienna, Georgia 31092, (229) 268-4744, mshelley@cityofvienna.org

2.2 Key Personnel

Dr. Jeff Ling, CCP – Project Principal (Will have contractual Authority over the project). Dr. Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector Evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has 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 includes:

- **Compensation/Classification–** He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal or Project Director for more than 1,300 public sector projects related to Classification and/or Compensation.**

- **Performance Evaluation –** He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.

- **Market Research –** He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.

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

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

Mr. Rob Williamson – Project Director (Will be the day-to-day contact with the City). Mr. Williamson is a Project Manager with Evergreen. He brings more than 20 years of proven leadership experience serving both private and public sector clients. His diverse leadership includes time as a business owner, County Commissioner, CEO of a mid-sized water and wastewater treatment utility, Executive Director of a three-member regional water utility provider, and most recently, Manager of the Florida Association of Counties' 23-county insurance trust.

During his career, Mr. Williamson has served on boards of directors for more than two dozen public, private, civic and charitable organizations. This includes time as Chairman of the Santa Rosa County Board of County Commissioners, RESTORE Council, Tourist Development Council, Florida/Alabama Transportation Planning Organization and as a member of the Florida Gulf Consortium, Florida Association of Counties Executive Board, Leadership Santa Rosa, and the Institute for County Government to name a few. He is also a member of the Florida Rural Water Association. Hey was a Keynote speaker for the Florida American Water Works Association for its Fall Conference Opening General Session in 2023.

Mr. Williamson helps organizations create new strategic pathways to solve complex problems. His areas of focus include policy development, strategic planning, change management, government services, transportation planning, master planning, tourism, RESTORE Act implementation and leadership development.

A sample of some of the local government projects that Mr. Williamson has directed or been involved with include: a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Calhoun, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Compensation Study for the City of Cedartown, GA; a Classification and Compensation Study for the City of Vienna, GA; a Compensation Study for the City of Duluth, GA; a Classification and Compensation Study for the City of Madison, AL; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for the City of Opelika, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; a Compensation Study for the City of Palmetto, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of Naples, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Plantation, FL; and a Classification and Compensation Study for the City of Kissimmee, FL; a Compensation Study and Analysis for McLean County, IL; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of White House, TN; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Compensation Study for the City of Portsmouth, NH; a Classification and Total Compensation Review for the City of Manchester, NH; a Classification and Compensation Study for Culpeper County, VA; and HR Market Study for Botetourt County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Onslow County, NC; a Classification and Compensation Study for Dare County, NC; a Compensation and Classification Study for Greenwood County, SC; a Compensation

Study for the Town of Central, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for the City of Del Rio, TX; a Classification and Compensation Study for Blanco County, TX; and a Classification and Compensation Study for the Town of Addison, TX. **Note: Rob has also worked with other Georgia public sector clients.**

Mr. Williamson has certifications from the Cambridge Leadership Institute and the Kenan-Flagler Business School Leadership Institute and possesses a Bachelor of Science Degree in Sociology from Florida State University.

Mr. Karl Fuchs – Project Consultant. Mr. Fuchs is a Senior Consultant with Evergreen with over 25 years of experience serving public sector organizations in various aspects of human resources management. His past roles include Human Resources Director and Plans and Operations Analyst. He is also a Retired Marine Corps Veteran. In addition to his regular duties while serving as a Human Resources Director, he successfully implemented creative recruiting and retention strategies which lessened time to hire and lengthened retention, especially in hard to fill positions. He streamlined and updated legacy processes and provided remedies for classification and compensation of non-bargaining unit employees.

Mr. Fuchs was a Plans and Operations Analyst working under DoD contract where he provided subject matter expertise on operational manpower and employment of U. S. Marine forces in the Middle East. He developed staffing requirements for Contingency Plans, multi-national joint exercises, and the deployment and redeployment of forces conducting combat operations. He also supervised staff in various HR roles such as pay management, employee recognition, and official travel.

While Mr. Fuchs was on active duty, he served in various capacities focusing on talent management and development. He also volunteered for assignments as DEI manager. He led and maintained compliance of programs including HRIS, pay/entitlements, promotions, limited duty, workplace investigations, performance management, employee recognition, corporate charge card, official travel, equal opportunity, separations/retirements, personnel accountability, and casualty affairs. Over the course of his career, he participated in training the Moroccan, Jordanian, and Afghan militaries.

A sample of some of the public sector projects that Mr. Fuchs has been involved with include: a Classification and Compensation Study for the City of South Fulton, GA; a Classification and Compensation Study for City of Atlanta, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Compensation Study for Highlands County Clerk of the Circuit Court and Comptroller, FL; a Classification and Compensation Study for the Town of Ft. Myers Beach, FL; a Compensation Study for Manatee County, FL; a Compensation and Classification Study for Jefferson County, FL; a Compensation Study for Sarasota County, FL; a Compensation and Classification Study for the City of Clearwater, FL; a Classification Study for the City of Orlando, FL; a Compensation Study for the City of Doral, FL; a Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for Garrett County, MD; a Classification and Compensation Study for Onslow County, NC; a Classification and Compensation Study for the City of Mauldin, SC; a Classification and Compensation Study for Richland County, SC; a Classification and Compensation Study and Analysis for Taylor County, TX; a Classification and Compensation Study and Analysis for Matagorda County, TX; a Comprehensive Classification, Compensation, and Staffing Analysis Study for the City of Odessa, TX; a Compensation and Classification Study for the City of Denton, TX; a Compensation Study for City of Pearland, TX; a Classification and Compensation Study for the City of Albuquerque, NM; a Classification and Compensation Study/ Gender Pay Equity Analysis for the City of Santa Fe, NM; a Classification and Compensation Study for the City of Yucaipa, CA; a Classification, Compensation, and Consultant Services for the City of Thousand Oaks, CA; a Classification and Compensation Study for the City of Fresno, CA; a Comprehensive Classification and Compensation Study for the Camarillo, CA; a Compensation and Benefits Study for the Long Beach Management Association, CA; a Compensation Review for Mariposa County, CA; a Classification and Compensation Study for Inyo County, CA; and Professional Technical and Expert Services for the City of Portland, OR.

Mr. Fuchs earned his Juris Master from Florida State University, College of Law and Bachelor of Arts in Business Administration specializing in Management from Saint Leo University. He is currently working on a Master's in Public Administration focusing on Local Government Management.

Ms. Brenda Whurr – Project Consultant. Ms. Whurr, PHR, SHRM-CP, is a Consultant with Evergreen who has more than 15 years of human resource management experience. As a former HR Director in both Florida and North Carolina, she led an HR team with onboarding, payroll processing and day-to-day employee issues; administered leave and workers' compensation; worked with leadership on recruiting strategies and employee relations issues; coordinated open enrollment and other benefits programs; implemented policies and procedures to assist in the transformation of a small company approach to a larger, multi-location company; transitioned the HR Department into a paperless document storage system; developed and implemented a recruiting program; and led initiatives for a Wellness Program and Family Fun Day to increase employee engagement.

A sample of some of the public sector projects that Ms. Whurr has been involved with include; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for the City of Duluth, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Hampton, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Classification and Compensation Study for the City of Madison, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for DeSoto County, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation Study for the City of White House, TN; a Compensation Study for the City of Morristown, TN; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification and Total Compensation Review for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Onslow County, NC; Classification and Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Wage and Compensation Study for Folly Beach, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for the City of Del Rio, TX; and a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX.

Ms. Whurr has a Bachelor's of Science in Management Information Systems and possesses a Professional Human Resources certification (PHR) as well as a certification as a professional with SHRM.

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

3.   Proposed Methodology and Related Information

In this section, we provide our approach and methodology for conducting the Compensation Study; a detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables in the services requirements of the RFP; and a proposed timeline.

3.1   Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Compensation Study for the City of Sandersville 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 designated Project Manager for the City (e.g., HR Director), the City Manager, and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your need to meet your performance goals while carefully managing your 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 details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

Evergreen realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.

3.2   Detailed Work Plan

In this section we include the detailed work plan that Evergreen proposes to use to conduct the Compensation Study for the City of Sandersville is provided in this section. Evergreen understands that the City has 91 full-time and eight part-time employees in 58 positions that will be included in the study.

Task 1.0 - Project Initiation

TASK GOALS: Finalize the project plan with the City; gather all pertinent data; finalize any remaining contractual negotiations; and establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

1.1   Discuss with the City's Project Manager (CPM), City Manager, and any other key staff the following objectives: review our proposed methodology, approach, and project work plan to identify any necessary revisions; reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and establish an agreeable communication schedule.

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

1.3   Obtain relevant materials from the City including: any previous projects, research, evaluations, or other studies that may be relevant to this project; organizational charts for the departments and divisions, along with related responsibility descriptions; current position and classification descriptions, salary schedule(s), benefits information; and classification system.

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

1.5   Provide progress reports to the CPM and City Manager throughout the study.

KEY PROJECT MILESTONES: Comprehensive project management plan and database of City staff

Task 2.0 – Evaluate the Current System

TASK GOAL: Conduct a comprehensive preliminary evaluation of the existing compensation.

TASK ACTIVITIES

2.1   Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.

2.2   Identify strengths and weaknesses of the current pay plan(s) and structure for the City.

2.3   Identify any pay compression issues that may exist.

2.4   Complete an assessment of current conditions that details the nature of the current system as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES: Review of existing compensation plan(s) and assessment of current conditions

Task 3.0 - Collect and Review Current Environmental Data

TASK GOALS: Conduct statistical and anecdotal research into the current environment within the City; and guide subsequent analytical tasks.

TASK ACTIVITIES

3.1   Schedule and conduct employee orientation sessions to describe the scope of work and methodology.

3.2   Interview department heads to obtain relevant information on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.

3.3   Hold focus groups with a sample of employees to obtain additional relevant information data on specific compensation issues and policies.

3.4   Work with the CPM and Human Resources staff to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.

3.5   Review any data provided by the City that may provide additional relevant insight.

KEY PROJECT MILESTONES: Employee focus groups and orientation sessions; Department head interviews; JAT and MIT distribution

Task 4.0 – Evaluate and Build Projected Classification Plan and Make FLSA Determinations

TASK GOALS: Identify the classification of existing positions utilizing the approved method for job evaluation; and characterize internal equity relationships within the City.

TASK ACTIVITIES

4.1   Ensure that all class specifications have been provided to Evergreen by the CPM.

4.2   Review the work performed by each classification and score based on job evaluation, including an evaluation of supervisory comments.

4.3   Review job evaluation scores and identify the classification of positions.

4.4   Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from job evaluation.

4.5   Develop preliminary recommendations for the classification structure and discuss with the CPM. The classification system designated at this point would be based solely on internal equity relationships and would be guided by the job evaluation scored for each classification. Essentially, a structure of classifications would be establishes, and classifications with similar scoring would be grouped and spacing between job classifications would be determined.

4.6   Develop recommendations of FLSA (exemption) status and minimum qualifications based on results of the job evaluation (JAT) review and federal requirements.

KEY PROJECT MILESTONES: JAT scores by class; recommended classification changes; and preliminary job structure based on internal equity

Task 5.0 – Identify List of Market Survey Benchmarks and Approved List of Targets

TASK GOALS: Identify positions to benchmark for the market salary survey; and Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary and benefits.

TASK ACTIVITIES

5.1   Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to identify the City's 58 classifications that will be used as benchmarks for the salary and benefits survey.

5.2   Finalize the list of positions with the CPM.

5.3   Develop a preliminary list of organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as: size of the organization; geographic proximity to the Sandersville area; economic and budget characteristics; and other demographic data.

5.4   Review and finalize with the CPM up to 20 organizations that should be included in the salary and benefits survey.

5.5   Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.

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

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

KEY PROJECT MILESTONES: Initial list of survey peers; survey methodology; and final list of survey organizations and contacts.

Task 6.0 – Conduct Market Salary Survey and Benefits Survey and Provide External Assessment Summary

TASK GOALS: Conduct the external labor market salary survey; conduct benefits survey; and provide a summary of the market salary and benefits survey results to the CPM.

TASK ACTIVITIES

6.1   Prepare a customized external labor market salary survey. Discuss questions and categories for the market survey.

6.2   Develop a listing of the current benefits provided by the City for comparisons with peer organizations.

6.3   Using the list of City provided benefits and major benefits offerings not provided by the City develop a list of benefits to include in the external labor market survey.

6.4   Prepare benefits survey to be included with salary survey developed in **Task 6.1**.

6.5   Review trends in benefit offerings and recommendations.

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

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

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

6.9   Validate all data submitted.

6.10   Develop summary report of external labor market salary and benefits assessment results.

6.11   Submit summary report of external labor market salary and benefits assessment results to the CPM.

KEY PROJECT MILESTONES: Market salary survey instrument; benefits survey instrument; and summary report of external labor market salary and benefits assessment results

Task 7.0 – Develop Strategic Positioning Recommendations

TASK GOALS: Discuss the City's compensation philosophy; and develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

7.1   Identify the compensation philosophy and accompanying thresholds.

7.2   Using the market salary and benefits survey data collected in **Task 6.0,** and the classification data reviewed in **Task 4.0**, recommend the appropriate pay plan(s) for the City.

7.3   Produce a pay plan for the City that meets its needs from an internal and external equity standpoint.

KEY PROJECT MILESTONE: Proposed compensation strategic direction, taking into account internal and external equity; and plan for addressing unique, highly competitive positions

Task 8.0 – Conduct Solution Analysis

TASK GOALS: Conduct analysis comparing job evaluations values; survey results for the benchmarking positions; and produce several possible solutions for implementation.

TASK ACTIVITIES

8.1   Conduct regression analysis or other appropriate techniques to properly slot select classifications into the proposed pay plan.

8.2   Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.

8.3   Create implementation solutions for consideration that take into account the current position of the City as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.

8.4   Meet with the CPM to discuss the potential solutions.

8.5   Determine the best solution to meet the needs of the City in the short-term and long-term and document the accepted solution.

KEY PROJECT MILESTONES: Potential solutions; and documented final solution.

Task 9.0 – Develop and Submit Draft and Final Reports

TASK GOALS: Develop and submit a draft and Final Report of the Compensation Study to the City of Sandersville; and present the Final Report.

TASK ACTIVITIES

9.1   Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the draft report to the CPM for review that will include all costs associated with all recommendations as well as a 1 -3 year phased-in implementation strategy with the least financial impact to the City's resources.

9.2   Make edits and submit the Final Report to the CPM.

9.3   Present the Final Report to the City Council.

9.4   Develop a communication plan for sharing study results with employees of the City and develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES: Draft and final reports; final presentation; communication plan; and implementation and maintenance database.

Task 10.0 – Develop Recommendations for Compensation Administration

TASK GOALS: Develop recommendations for continued administration by the City staff to sustain the recommended compensation and classification system; and conduct training.

TASK ACTIVITIES

10.1   Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system by City staff, including recommendations and guidelines related to: how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their position; the proper mix of pay and benefits; how often to adjust pay scales and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.

10.2   Present recommendations to the CPM.

10.3   Finalize recommendations and provide training and tools to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted.

KEY PROJECT MILESTONES: Recommendations for compensation administration; and training

Task 11.0 – Provide Revised Class Descriptions

TASK GOALS: Update existing class descriptions; create new class descriptions for only those classifications recommended by Evergreen as a result of the job evaluation; and provide final version of all class descriptions/specifications in electronic format (i.e., MS Word)

TASK ACTIVITIES

11.1   Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.

11.2   Discuss any necessary changes to the class description format with the CPM.

11.3   Update classification descriptions based on data gathered from the job evaluation process.

11.4   Create new class descriptions only for those classifications recommended by Evergreen as a result of the job evaluation process.

11.5   Recommend a systematic, regular process for reviewing class descriptions.

KEY PROJECT MILESTONES: Updated class descriptions; new class descriptions as needed; and recommendations for regular review of class descriptions

3.3   Proposed Project Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct the Compensation Study for the City of Sandersville in approximately four months of the project start date and following the signing of the contract. Our project timeline is based on a tentative start date of July 16, 2024, as stated in the RFP, and a completion date of November 15, 2024. Our proposed timeline can be modified in any way to best meet the needs of the City. **As shown above we can begin the study no later than August 1.**