CITY COUNCIL WORK SESSION

Monday, January 05, 2026 at 5:30 PM

Council Chambers - 331 First Street East

AGENDA

RULES OF PROCEDURE

Workshops are not Public Hearings. No member of the public or interested party has the right to make a presentation or address the Council on an item under consideration in a workshop or a study session.

During the City Council Work Session, the Council will primarily discuss and debate items intended to be formally considered at a future City Council Meeting. However, the Council may at any noticed meeting, including a City Council Work Session meeting, take action on any item shown on the posted agenda as a potential action item. The City Council Work Session meeting is a regular meeting of the Independence City Council.

MEETING OPENING

Call the Meeting to Order

PRESENTATIONS

1. Buchanan County Economic Development Commission – Annual Update

NEW BUSINESS

2. Classification and Compensation Study
3. 10-Year CIP
4. Strategic Plan
5. Ordinance to amend Chapter 175 – Subdivision Regulations, to align design standards with the Statewide Urban Design And Specifications (SUDAS)
6. Voluntary Annexation Application Update
7. ILPT Annual Billing Agreement
8. Council Topics
9. Mayor Topics
10. City Manager Topics

POTENTIAL ACTION ITEMS

11. Closed Session pursuant to Iowa Code 21.5(1)(j): Real Estate Strategy
12. Action regarding Real Estate Strategy following Closed Session

ADJOURNMENT

This agenda is subject to change.

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA – City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Buchanan County Economic Development Commission – Annual Update

DISCUSSION:

The Director of the Buchanan County Economic Development Commission will be present to go over the Annual Update with the Council.

Attached is the Annual Update document.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

GROW BUCHANAN
25
PARTNER CHILI COOK-OFF
GROW BUCHANAN

Beat Burnout
DISCOVER STRATEGIES TO COMBAT AND PREVENT BURNOUT, REVITALIZING YOUR LIFE
JOIN US!
10.8.25
11AM - 1PM
Heartland Acres Event Center
Independence, IA
$30 Entry - Knowledge & Lunch Included
PRESENTED BY
HOLLY MACKEY
BUILDING BETTER BUSINESS IN BUCHANAN SERIES SPONSORED BY
GROW BUCHANAN
INDEPENDENCE
IOWA STATE UNIVERSITY

CARTER

FREE PUBLIC
GRANT WRITING
WORKSHOP
3/4/25 6-7PM
HEARTLAND ACRES - INDEPENDENCE
REGISTER TODAY!
THE BUCHANAN COUNTY COMMUNITY FOUNDATION IS HOSTING A PUBLIC GRANT WRITING WORKSHOP TO DISCUSS IT'S 2025 GRANT CYCLE. THEY WILL REVIEW GUIDELINES, BUDGET TEMPLATE AND APPLICATION AND PROVIDE WRITING TIPS WITH TIME FOR Q&A.
PRESENTED BY
BUCHANAN COUNTY COMMUNITY FOUNDATION
IOWA STATE UNIVERSITY
GROW BUCHANAN
INDEPENDENCE

GROW BUCHANAN
PLATINUM
PARTNERS IN PROSPERITY
BANKIOWA
TRUST YOU CAN BANK ON
230 1ST ST E / INDEPENDENCE, IA / 319.334.7181
800.433.0285 / BANKIOWA.COM

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BUCHANAN
ECON
DEV
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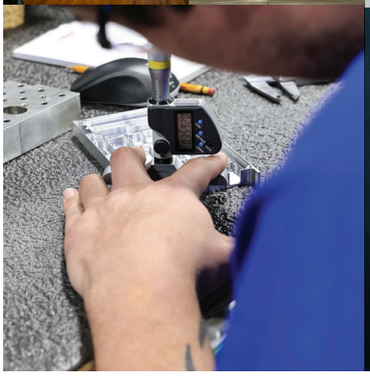
LEAD
BUCHANAN
ACADEMY



PARTNERS IN PROSPERITY

AL RESERVE NOTE
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LEADERSHIP SERIES
25
BUCHANAN CO. IOWA

Revitalization
Through Funded
Preservation

Advancing Prosperity With Strategic Partners

The Buchanan County Economic Development Commission (BCEDC) works to promote prosperity across Buchanan County through strategic collaboration, targeted investment, and long-term economic growth. Our work supports business growth, downtown vitality, workforce development, housing, and tourism, recognizing that strong communities and a resilient economy are built through coordinated effort and shared vision. BCEDC is committed to creating a positive economic environment for new and existing industry and small businesses.

In 2025, BCEDC continued to move initiatives from planning into implementation while closing out several multi-year projects. The year reflects both measurable outcomes and sustained momentum, reinforced by strong partnerships at the local, regional, and state levels.

Economic development is a team effort. Progress happens when communities, businesses, financial partners, utilities, and organizations align around a shared vision for Buchanan County's future.

Independence Iowa – Celebrate our spirit!
The Friendliest Town for Miles Around – Winthrop Iowa
City of Jesup
Lamont
Hazleton
City of Fairbank Iowa – Buchanan-Fayette County
City of Stanley – Inc. 1914 – Buchanan County, Iowa
Brandon, Iowa
Seal of Buchanan County, Iowa
Aurora
Quasqueton
Rowley

The Power of Partnership

At the core of Buchanan County's economic progress is collaboration. BCEDC's work is only possible through strong, trusted partnerships with communities, businesses and industries, financial institutions, utilities, education partners, and regional and state organizations. Economic development does not happen in isolation. It succeeds when partners work together toward common goals.

We serve as a convener and connector, aligning resources, strengthening coordination, and maximizing impact. This collaborative approach is the foundation behind every successful project and initiative highlighted in this report.

GROW BUCHANAN ECON DEV

Connection
We link people and groups to resources for shared goals

Collaboration
We engage our partners in dynamic ways that support success

Vision
We drive momentum for the future by seeding and cultivating progress

Sustainability
We maximize potential for our partners now and the future

★ *Northeast Security Bank's commission of Hatala Illustration's striking public art mural further beautified the Independence historic downtown district*

WHAT WE'VE **BEEN UP TO**

01 | **Downtown Investment and Community Revitalization**

02 | **Business Development and Financial Support**

03 | **Leadership & Workforce Development**

04 | **Housing as Economic Infrastructure**

05 | **Regional and Statewide Engagement**

06 | **Tourism and Quality of Life**

In 2025, we launched an updated website designed to better serve businesses, site selectors, and community partners. The refreshed platform improves access to available resources, programs, properties, and data, strengthening BCEDC's ability to connect businesses with opportunities and streamline key economic development content and vital support.

01 | Downtown Investment and Community Revitalization

Revitalizing Our Downtowns

Downtown investment remained an important focus of BCEDC's work in 2025, with an emphasis on advancing projects, strengthening local planning efforts, and ensuring long-term community impact. Both the Independence and Fairbank Community Catalyst Building Remediation projects were formally closed out by the State of Iowa in 2025, marking the successful completion of multi-year redevelopment efforts led by BCEDC.

State recognition followed when Iowa Economic Development Authority Director Debi Durham visited Buchanan County to tour completed Catalyst sites, reinforcing the value of reinvesting in historic downtown buildings and highlighting Buchanan County's effective use of state resources.

In Independence, redevelopment efforts resulted in the thriving Gedney Bakery and Coffeehouse and the addition of new upper-story housing units, strengthening downtown activity and residential opportunity. In Fairbank, the restoration of the historic Welsh Building culminated in the opening of The Farmer's Kitchen, creating a new community destination and reinforcing Main Street vitality.

In Jesup, revitalization momentum continued through the formation of a Downtown Revitalization Committee. This locally led group is working collaboratively with BCEDC to explore strategies, identify opportunities, and advance planning efforts aimed at enhancing Jesup's downtown core. These efforts focus on strengthening business vibrancy, improving building utilization, and positioning downtown Jesup for long-term success.

02 | Business Development and Financial Support

Investing in Progress

BCEDC continued to use its Revolving Loan Fund to support entrepreneurship, business expansion, and tourism-related development. The BCEDC's Revolving Loan Fund program had a strong year in 2025, approving four loans that supported new business activity, local entrepreneurship, and Buchanan County tourism-related development:

The Farmer's Kitchen – Fairbank: New restaurant located in the restored Catalyst building, contributing to downtown activity and local employment.

The Green Roast Café – Jesup: New coffee and lunch destination strengthening Jesup's business mix.

The Farmer's Wife – Jesup: A young entrepreneurial team purchasing an existing business, supporting succession planning and next-generation ownership.

River Palace Holdings – Independence: Development of three upper-story short-term rental units, expanding lodging options and enhancing tourism capacity within the community.

In addition, BCEDC approved two Key Business Grants in 2025 for Lamont SIPS in Lamont and The Green Roast Cafe in Jesup. The Key Business Grant program is used to spur growth throughout Buchanan County by supporting businesses that are unique to the economic and social well-being of their communities.

Funding for this program originated from donated property that was sold, providing a unique opportunity to reinvest those proceeds directly back into Buchanan County businesses and communities. This reinvestment reflects BCEDC's commitment to responsible stewardship and long-term local impact.

The RLF program serves as a flexible, gap-financing tool that helps local businesses launch, expand, and succeed.

Iowa Economic Development Authority Director Debi Durham's tour of Independence Premium Foods highlighted early growth and reinforced state confidence in Buchanan County's latest major industry.

03 | Leadership & Workforce Development

LEAD Buchanan Academy '25

2025 marked the successful completion of the inaugural LEAD Buchanan Academy, a collaborative leadership development initiative designed to strengthen community engagement and practical leadership skills. Participants explored Buchanan County's assets, including local organizations, civic involvement, and diverse volunteer opportunities. The program's impact was reinforced by the award of a 2026 SPARK Grant, written jointly by Buchanan County Tourism (BCT) and BCEDC, ensuring continued growth and expanded opportunities for future participants. Partner organizers include BCT, Independence Chamber of Commerce, ISU Extension & Outreach and Hawkeye Community College.

"The LEAD Buchanan Academy has taken me out of my comfort zone in so many ways and doing the volunteer opportunity was one of the biggest but at the same time has been great to reconnect with my hometown and hopefully be able to give back and provide more opportunities than we have in the past." - SARAH BOYD / 2025 LEAD GRADUATE

Business Leadership Series '25

Developing people remains a cornerstone of economic development. In 2025, BCEDC and Hawkeye Community College celebrated the fourth year of the Business Leadership Program Series. Serving 22 participants countywide, the program delivered professional development focused on leadership, communication, productivity, and team performance, strengthening local leadership capacity and supporting workforce retention through more effective, resilient workplace teams.

The 2026 Session is set to kick off on September 15th!

04 | Housing as Economic Infrastructure

Home Sweet Home

Housing availability remains a key factor in attracting and retaining workforce talent. In 2025, BCEDC participated in the Regional Housing Task Force led by Butler County REC, supporting collaborative, multi-county housing solutions. This work will culminate in a Regional Housing Symposium. Additionally, Executive Director Lisa Kremer served on the Habitat for Humanity Steering Committee, reinforcing housing's role in workforce stability and long-term economic growth.

05 | Regional + Statewide Support

Amplifying Our Reach

BCEDC expanded its presence in 2025 through enhanced statewide and regional leadership. The appointment of Lisa Kremer, BCEDC Executive Director to the Iowa Rural Development Council amplified Buchanan County's voice in rural economic development. Ongoing engagement with Cedar Valley Regional Partnership site selector efforts, regional job fairs, and Leadership Iowa panels strengthened connections between employers, workforce, and opportunity.

06 | Tourism & Quality of Life

Welcome to Buchanan County!

Tourism remains a vital contributor to Buchanan County's economy, strengthening the tax base, supporting small businesses, and enhancing quality of life. These amenities help attract workforce, retain residents, and reinforce community identity. In 2025, BCEDC continued close collaboration with Buchanan County Tourism, supporting initiatives such as the First Impressions Grant, RAGBRAI-related efforts, and other community-focused projects. **Visitor spending held steady at $17.6 million in 2024, outperforming surrounding counties**. Since 2021, strategic marketing and engagement have driven a 35.8% increase in visitor spending, 28.8% growth in business sales, and a 14% rise in visitor-generated taxes, easing the local tax burden while supporting long-term economic development.

GROW BUCHANAN ECON DEV

PARTNERS IN PROSPERITY

As BCEDC marked its 30th year, the accomplishments of 2025 reflect both steady progress and strong momentum.
This impact is built on the dedication and leadership of the BCEDC Board of Directors, along with the vision and commitment of past and present directors and staff who have helped shape the organization over the last three decades. Their collective efforts have played a significant role in attracting new businesses, supporting the growth and expansion of existing industries, and positioning Buchanan County as a competitive place to invest and grow.

Through this sustained work, BCEDC has helped strengthen Buchanan County's tax base, support job creation across multiple sectors, and enhance overall quality of life for residents. By aligning business development, workforce, housing, tourism, downtown investment, and regional collaboration, we remain focused on building a resilient, competitive, and thriving Buchanan County, now and into the future.

Gerald W. Dennie

Gerald Dennie, BCEDC Board Chairman

Lisa Kremer

Lisa Kremer, BCEDC Executive Director

THE BCEDC BOARD 2025

Gerald Dennie / **Chairman** / Mayor - Winthrop
Darin Hayzlett / **Vice Chairman** / Mayor - Hazleton
Terry Toale / **Treasurer** / Banklowa
Chris Even / **Secretary** / Mayor - Jesup

Dave Young / Mayor - Aurora
Guy Stacy / Mayor - Brandon
Jason Kayser / Mayor - Fairbank
Brad Bleichner / Mayor - Independence
Mike Cook / Mayor - Lamont
Joe Miller / Mayor - Quasqueton
Sue Webster / Mayor - Rowley
Rob Irwine / Mayor - Stanley

Dawn Vogel / Buchanan County Supervisor
Dean Hamblin / Livestock Association
Isabel Thurn / Buchanan County Tourism
Teresa Floyd / East Central IA REC
Landon Geater / Geater Machining & Manufacturing
Celia Even / Hawkeye Community College
Lisa Kremer / BCEDC Executive Director
Shawn Bainbridge / BCEDC Marketing+Comms Mgr

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Classification and Compensation Study

DISCUSSION: The City of Independence recently issued a Request for Proposals (RFP) to select a qualified consultant to conduct a comprehensive city-wide Classification and Compensation Study. This study is a strategic priority to ensure our human resources framework enables us to attract and retain a high-quality workforce, ensures internal equity among positions, and maintains external competitiveness within the current labor market.

Strategic Importance: Why This Study is Critical While the City has reviewed individual positions periodically, a comprehensive city-wide analysis has not been conducted in recent history. As a result, our current pay structures and job descriptions have evolved "organically," creating significant operational and liability risks. This study is not merely an administrative exercise; it is a necessary investment to correct these issues:

- **Recruitment & Retention:** The labor market has shifted dramatically. Without accurate, data-backed market comparisons, the City risks overpaying for some roles while underpaying for critical positions, leading to failed recruitments and the costly turnover of experienced staff.
- **Legal Compliance & Risk Mitigation:** We must ensure all job descriptions and pay practices comply with evolving federal laws, including the Fair Labor Standards Act (FLSA) and the Americans with Disabilities Act (ADA). Outdated descriptions could leave the City vulnerable to wage-and-hour lawsuits or discrimination claims.
- **Internal Equity:** Inconsistencies in how jobs are classified can lead to morale issues where employees with similar responsibilities are paid disparately. This study establishes a defensible, objective system to ensure fairness across all departments.
- **Fiscal Responsibility:** Moving from a reactive approach to a structured compensation plan allows the Council to forecast personnel costs accurately and make data-driven budget decisions rather than ad-hoc adjustments.

Selection Process: The City received ten (10) proposals in response to the RFP, with costs ranging from $28,500 to $84,000. An evaluation committee comprised of the City Manager, Assistant City Manager/City Clerk/Treasurer, Deputy City Clerk, and all Department Heads reviewed each proposal based on experience, methodology, client references, and cost.

Our primary goal was to identify a partner who would not only deliver a market-accurate pay plan but also empower our internal team to maintain the system independently, avoiding long-term reliance on outside consultants for routine updates.

Proposals Received: The following proposals were evaluated (ranked by cost):

- **Evergreen Solutions:** $28,500
- **PayPoint HR:** $32,500 *(Non-Compliant: Failed to acknowledge addenda)*
- **Gallagher Benefit Services:** $34,500
- **AutoSolve, Inc.:** $36,750
- **McGrath Human Resources Group:** $37,344
- **Baker Tilly:** $37,400
- **MGT:** $51,975 *(Non-Compliant: Failed to acknowledge addenda)*
- **CBIZ:** $59,950
- **Synergized HR:** $62,000 *(Non-Compliant: Failed to acknowledge addenda)*
- **Logic Compensation Group:** $84,000

Staff Analysis While four firms submitted lower bids than the recommended consultant, they were not selected by the Committee for the following reasons:

- **Evergreen Solutions:** Their maintenance model relies on proprietary software ("JobForce Manager"), which could create a long-term dependency on their platform rather than the process ownership we desire.
- **PayPoint HR:** The proposal was non-compliant.
- **Gallagher Benefit Services:** Their proposal included significant legal exceptions regarding federal contracting provisions and indemnification, introducing what we believe is unnecessary contractual risk.
- **AutoSolve, Inc.:** Their proposal utilized a virtual-first model. Staff prioritized a partner committed to on-site engagement for Council presentations and staff training.

Selection Staff has identified **McGrath Human Resources Group** as the best value partner for the City. Their proposal distinguished itself in three key areas:

1. **Commitment to Independence:** McGrath uses a "teach-to-fish" methodology, dedicating specific project phases to training our leadership team on their point-factor analysis method. This ensures we can reclassify jobs internally in the future without incurring additional consulting fees.
2. **Data Integrity:** They utilize "fresh" market data collected specifically for Independence rather than aged third-party data.
3. **Relevant Experience:** They have a strong track record with comparable Iowa municipalities, including West Des Moines and Polk County.

Fiscal Impact The cost of the study is **$37,344**. While slightly above the initial $35,000 budgeted amount in the current budget, funds are available within the current budget to cover this additional cost.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

Professional Technical Proposal prepared for the

City of Independence, Iowa

Classification and Compensation Study

Submitted By:

McGrath Human Resources Group

Corporate Office
PO Box 865
Jamestown, TN 38556

Dr. Victoria McGrath, CEO
victoriaphd@mcgrathconsulting.com
815.728.9111

November 20, 2025
4:00 PM CST

Part A: Transmittal Letter

November 12, 2025

City of Independence
Matthew R. Schmitz
City Manager
331 1st Street E
Independence, IA 50644

Dear Matthew R. Schmitz:

Thank you for the opportunity to submit our qualifications to become your compensation business partner to perform a Classification and Compensation Study for the City of Independence, Iowa.

Developing and maintaining a competitive classification and compensation plan in today's fiscally conservative environment is extremely challenging, yet essential to attract, motivate, engage, and retain a qualified workforce. McGrath Human Resources Group understands the issues public sector entities are facing as our firm provides human resources consulting services primarily for the public sector, with emphasis on compensation. We offer a transparent, engaging, and collaborative approach to develop a compensation solution built specifically for each client, which aligns with your compensation philosophy and strategy to attract and retain competent professionals, conform to all legal requirements, and fit within the City's fiscal reality.

In order to ensure proper delivery, this proposal is current as of November 12, 2025. Detailed information regarding our firm, consulting team, scope of work, work plan, methodology and process, proposed work schedule, project fees, and other required information are presented within this proposal. All conditions contained in the attached proposal are valid for a minimum of 90 days from November 20, 2025. I am the authorized individual to contractually bind the Firm and principal contact for this project.

As you review the proposal, if you have any questions or require additional information, please do not hesitate to ask. We look forward to the opportunity to work with the City of Independence and its employees on this important project.

Sincerely,

Victoria J. McGrath, Ph.D., CEO
PO Box 865 Jamestown, TN 38556
815.728.9111 (office)
931.214.2262 (direct)
victoriaphd@mcgrathconsulting.com

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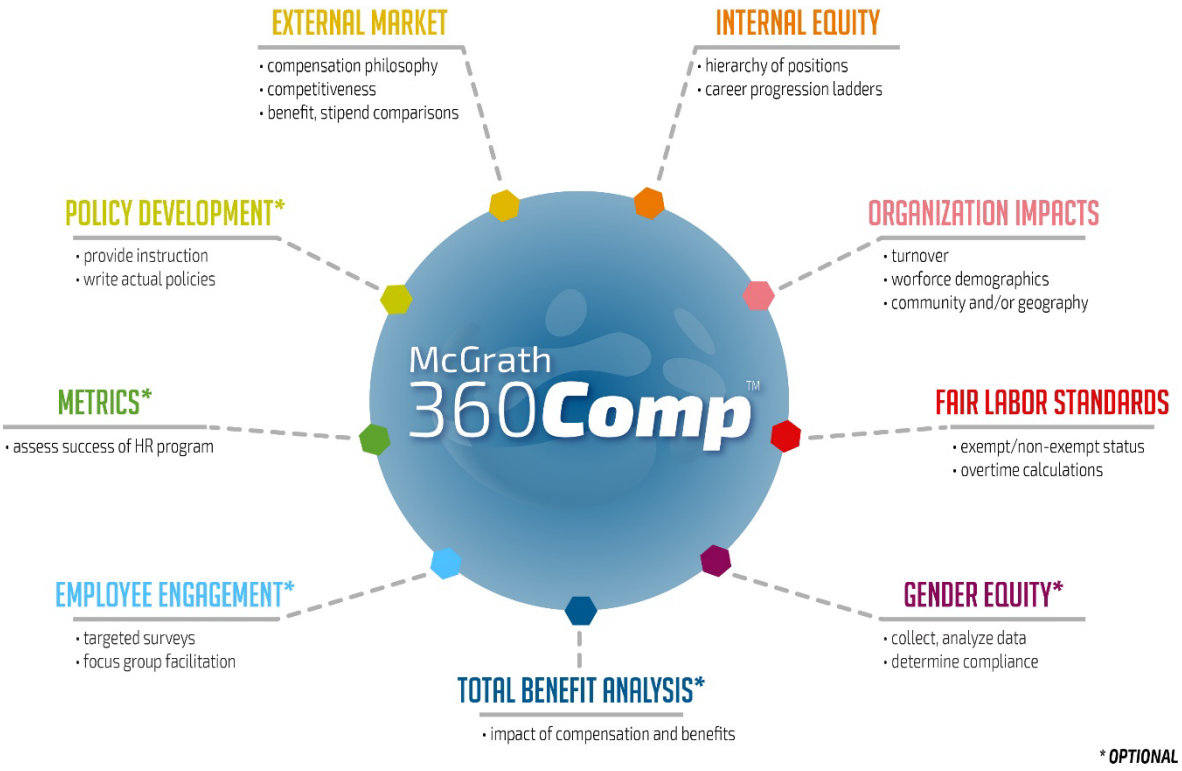

EXTERNAL MARKET
• compensation philosophy
• competitiveness
• benefit, stipend comparisons
INTERNAL EQUITY
• hierarchy of positions
• career progression ladders
POLICY DEVELOPMENT*
• provide instruction
• write actual policies
ORGANIZATION IMPACTS
• turnover
• worforce demographics
• community and/or geography
McGrath
360Comp™
METRICS*
• assess success of HR program
FAIR LABOR STANDARDS
• exempt/non-exempt status
• overtime calculations
EMPLOYEE ENGAGEMENT*
• targeted surveys
• focus group facilitation
GENDER EQUITY*
• collect, analyze data
• determine compliance
TOTAL BENEFIT ANALYSIS*
• impact of compensation and benefits
* OPTIONAL

Part B: Firm Experience and Qualifications

McGrath Consulting Group, Inc. was started in 2000, specializing in public sector consulting in the fields of human resource management and public safety (fire, EMS, police, and communications). Our Firm has over 20 professional consultants who are assigned to projects based upon their professional background and skillset they bring to each client.

McGrath Human Resources Group is the Human Resources Division overseen by Dr. Victoria McGrath. Since 2000, McGrath has conducted hundreds of comprehensive compensation and classification studies nationwide. The Human Resources consulting team is comprised of experienced human resources practitioners from the private sector, local city and county government, and library systems.

Company Name	McGrath Human Resources Group
Parent Organization	McGrath Consulting Group, Inc.
Established	May 1, 2000
Years of Service	25
Type of Firm	Private Corporation
Company Mailing Address	P.O. Box 865 Jamestown, TN 38556
Responsible Party	Dr. Victoria McGrath, Ph.D., SPHR CEO
Email Address	victoriaphd@mcgrathconsulting.com
Phone Number	(815) 728-9111
Insurance	Erie Insurance: Auto and General Liability AmTrust: Workers Compensation Mount Vernon: Professional Liability Chubb: Cyber Security Liability Certificates of Insurance provided with services agreement
Office Locations	Kansas • Missouri • Ohio • Tennessee • Texas • Wisconsin Project Manager is located in the Wisconsin Office

We do not offer an off-the-shelf work product, but rather, we approach each client with the goal to understand your organization, culture, current and future needs, and fiscal reality to develop total compensation solutions that are developed uniquely for you, align with your compensation philosophy and strategy, while using a collaborative and transparent process.

Our Firm also provides related human resources consulting which includes but is not limited to benefit analysis, job description development, HR Audits, performance management program development, Fair Labor Standards Act (FLSA) exemption reviews, training, policy development, operational studies, and staffing studies. Our Human Resources team is also involved in organizational studies related to public safety.

Why Chose McGrath Human Resources Group?

We do not ask you to adapt to an off-the-shelf solution.

- Even in municipalities that appear to be similar, each entity has unique qualities, culture and needs.
- We work hard to understand your goals, fiscal realities, and compensation history so we can offer practical and sustainable options for a compensation solution that addresses your needs while holding to best practices to maintain validity and compliance in the system.

We specialize in and understand public employment and local municipalities.

- We specialize in public sector consulting; thus, we are in a unique position to understand and work with your stakeholders to make a sound investment that will benefit the City.
- Our consulting team is comprised of individuals with previous city and county government professional work experience.
- An investment in your employee's compensation plan is an investment in your community, and we recognize the investment you are making is with taxpayer dollars.

Our long history brings a unique breadth of experience.

- We have experience with the development of innovative or traditional approaches, with the knowledge of climates where those approaches usually succeed to help us tailor the best solutions for you.
- We wish to foster a partnership with our clients by pursuing a depth of understanding of your philosophy, culture, challenges, and successes so the synergy outcome provides a compensation system that makes sense philosophically and fiscally for your organization.

We are successful.

- In our 25th year in business, with over 620 client projects, we are proud that 99% of our projects have been fully adopted and implemented.
- Our success stems from sound principles and best practices throughout our work and the relationships we build through collaboration and transparency with the project.

Public Sector Project History

McGrath primarily works with public-sector organizations including counties, cities, villages, townships, districts, and even State agencies. The following is a list of compensation and classification type projects this consulting team has worked on and completed over the last five (5) years.

AODAMHS of Montgomery, OH	City of West Bend, WI
Barron County, WI	City of West Des Moines, IA
Benton County, WA	City of White Bear Lake, MN
Boone County, MO	City of Winfield, IL
Burnett County, WI	City of Woodridge, IL
Butler County, KS	Clatsop County, OR
Cabarrus County, NC	Clay County, MO
Caroline County, VA	Codington County, SD
City of Alamosa, CO	Coffey County, KS
City of Alcoa, TN	Columbia County, WI
City of Ashland, OR	Community Library Network, ID
City of Bloomer, WI	Coos County, OR
City of Bonner Springs, KS	Cowley County, KS
City of Carthage, MO	Cumberland County, NC
City of Champaign, IL	Daniel Boone Regional Library, MO
City of Chanhassen, MN	Davidson County, SD
City of Chardon, OH	Denco Area 911 District, TX
City of Chetek, WI	Derby Recreation Commission, KS
City of Chippewa Falls, WI	Dodge County, WI
City of Coffeyville, KS	Dodge County Library, KS
City of Collinsville, IL	Douglas County, WI
City of Columbus, KS	Douglas County, KS
City of Crossville, TN	Finney County, KS
City of Derby, KS	Ford County, KS
City of De Pere, WI	Forest Preserve District of Kane County, IL
City of Dodge City, KS	Forest Preserve District of DuPage County, IL
City of Duval, WA	Green County, WI
City of Eau Claire, WI	Harlem Roscoe Fire Protection District, IL
City of Excelsior Springs, MO	Harvey County, KS
City of Fayetteville, AR	Jordanelle Special Service District, UT
City of Flint, MI	Juneau County, WI
City of Florissant, MO	Kent County, MI
City of Forest Lake, MN	Kingsbury County, SD
City of Garden City, KS	Lawrence Public Library, KS
City of Gig Harbor, WA	Marathon County, WI
City of Goodland, KS	Merrimac Center, VA

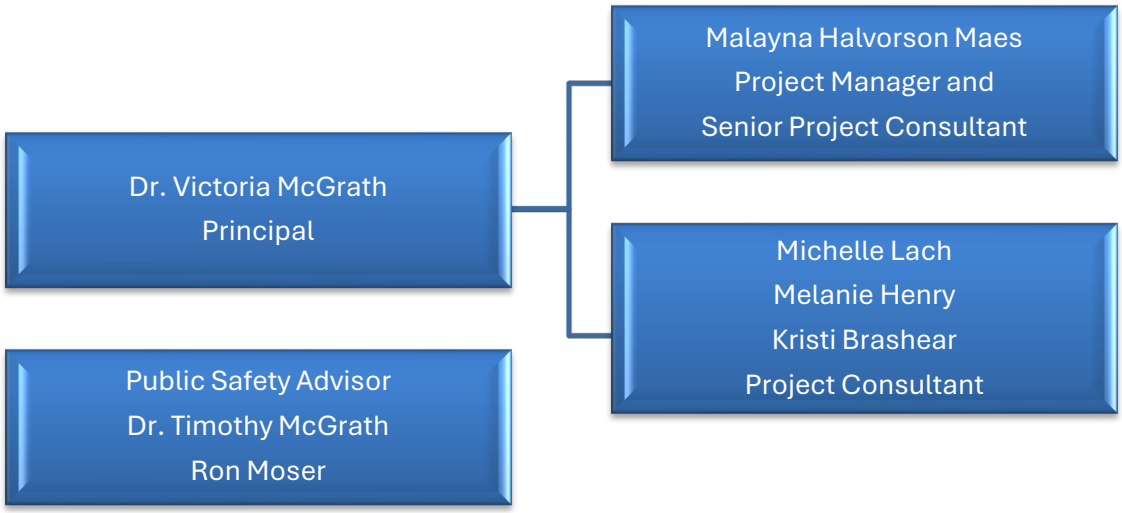
City of Grandview, MO	Mid-Columbia Libraries, WA
City of Grants Pass, OR	Minnehaha County, SD
City of Greer, SC	Monroe County, WI
City of Haysville, KD	Montgomery County, TN
City of Ingleside, TX	Montgomery County, OH
City of Kenai, AK	New Kent County, VA
City of Kenmore, WA	New River Valley Juvenile Detention Home, VA
City of Kirkwood, MO	North Central Washington Libraries, WA
City of Knoxville, TN	North Park Public Water District, IL
City of La Vista, NE	Oconto County, WI
City of La Crosse, WI	Outagamie County, WI
City of Lake Geneva, WI	Polk County, WI
City of Lansing, KS	Polk County, IA
City of Lawrence, KS	Portage County, WI
City of Lincoln City, OR	Pulaski County, AR
City of Manor, TX	Racine County, WI
City of Marshfield, WI	Roanoke Valley Juvenile Detention Center, VA
City of Merriam, KS	Rock County, WI
City of Monroe, WI	Rowan County, NC
City of Naperville, IL	Saginaw Charter Township, MI
City of Nevada, MO	Saginaw Township, MI
City of Newton, KS	SCCWWA, NE
City of North Kansas City, KS	Scenic Library, MO
City of Northfield, MN	Sedgwick County, KS
City of Ogden, UT	Sheboygan County, WI
City of Ottawa, KS	Somerset School District, WI
City of Palos Heights, IL	South County Fire Department, WA
City of Pearland, TX	Springfield-Greene County Library, MO
City of Perryville, MD	St Johns Fire Protection District, SC
City of Pleasant Valley, MO	St. Croix Chippewa Indians of Wisconsin, WI
City of Plymouth, WI	St. Croix County, WI
City of Prairie Village, KS	Tooele County, UT
City of Raymore, MO	Town of Blacksburg, VA
City of Richmond, MO	Town of Fairview, TX
City of River Falls, WI	Town of Greeneville, TN
City of Roeland Park, KS	Town of Holly Springs, NC
City of Sarasota Springs, UT	Town of Prescott Valley, AZ
City of Sequim, WA	Union County, NC
City of Smithville, MO	Vernon County, WI
City of Stayton, OR	Village of Grafton, WI
City of Tigard, OR	Village of Lake in the Hills, IL
City of Topeka, KS	Village of Mount Pleasant, WI

City of Tucson, AZ	Village of Rib Mountain, WI
City of Tukwila, WA	Wasatch County, UT
City of Unalaska, AK	West Chester Township, OH
City of Union, MO	Winnebago County, WI
City of Washington, MO	Wisconsin Employee Trust Funds, WI
City of Wasilla, AK	Wood County, WI
City of Watertown, WI	Yakima Valley Library, WA
City of Webster Groves, MO	

Consultant Qualifications

All consultants are McGrath consultants, and there is **no subcontracting**.

The Consultants were selected for this project based upon their areas of expertise, specialties, and related project experience. We operate under the philosophy of total team involvement and each team member has experience in all facets of project work and will work together to meet the goals of your project. Further, we have the flexibility to involve other consultants with our organization to bring their unique perspective and expertise as needed. Primary members of the team and an overview of their project responsibilities are provided.



Principal: A principal of the company is actively involved in every project and is accountable for the project. This position will have authority over the contract and to bind the Firm.

Project Manager: This role has project oversight, will coordinate all work with the consulting team, will have direct routine communication with the City's project designee, and will be hands on in all aspects of the project's activities, leading the consulting team on targeted project activities, and performs duties of a project consultant.

Project Consultant: This role works on various project activities, which will include communication documents/tools, interviews, position questionnaire analysis, job description review, classification system development, market data collection and analysis, pay plan review, compensation system development, costing, and drafting reports.

Advisor: This role has specific subject matter expertise that may be called upon for additional consultation for the consulting team for public safety positions, if needed.

Victoria McGrath, Ph.D., SPHR
Chief Executive Officer and Principal

Dr. Victoria McGrath brings more than 25 years of leadership as Co-Founder and CEO of McGrath Consulting Group, Inc., and its subsidiary, McGrath Human Resources Group, where she has successfully advised and partnered with more than 460 local government clients nationwide. For over two decades, she has guided organizations in developing compensation structures tailored to meet their unique needs, grounded in her core philosophy that effective compensation systems should balance market competitiveness, internal equity, and organizational culture. She strongly believes in building long-term partnerships with her clients, ensuring that solutions are practical, sustainable, and aligned with each organization's mission and values.

Her expertise spans compensation and classification, organizational assessments, staffing structures, leadership development, and operational efficiency. With over 19 years of hands-on HR practitioner experience in both public and private sectors, including municipalities, school districts, health care, banking, and education—she brings a rare combination of real-world insight and strategic vision.

Her consulting career has focused on providing management and HR assistance to municipalities, and special districts on issues including compensation and classification, staffing structures, operational efficiency, and organizational assessments. She has also been a frequent speaker at professional conferences, sharing her expertise on compensation, HR strategy, and organizational transformation.

In addition to her consulting work, Dr. McGrath served as an adjunct professor at Northwestern University, teaching courses in human resources, organizational development, management, and research within the Master's in Public Policy and Administration program. Her doctoral dissertation, *Municipal Government as a Learning Organization,* explored how government entities can improve efficiency and effectiveness in delivering services by embracing continuous learning principles.

YEARS WITH FIRM: 25

EDUCATION

- Ph.D. – Municipal Government as a Learning Organization, University of Wisconsin–Milwaukee
- Master of Science – Management, Cardinal Stritch College, WI
- Bachelor of Science – Industrial Relations & Finance, University of Wisconsin–Milwaukee

PROFESSIONAL AFFILIATIONS

- Society for Human Resources Management
- National Public Employer Labor Relations Association

Malayna Halvorson Maes
Project Manager

Malayna Halvorson Maes serves as a Senior Human Resources Consultant where she provides expert guidance to public sector clients in the areas of classification and compensation, performance management, and total rewards. Drawing on her extensive background as both a practitioner and leader in local government, she helps organizations design and implement practical, equitable, and sustainable human resource systems that align with operational needs and workforce goals. Ms. Maes brings a collaborative, solution-oriented approach to every engagement—ensuring that HR strategies are not only compliant but also reflective of organizational culture and employee engagement priorities. She is also a member of the Public Safety consulting team, bringing HR Solutions to public safety, and serves as the Firm's primary projects coordinator.

Ms. Maes has served as a human resources professional in both the private and public sectors for more than 20 years. Prior to joining McGrath, she worked in private sector human resources and later as the Human Resources Director and senior advisor for a county in northwestern Wisconsin. In that role, she provided leadership through major organizational and legislative changes at the State level (known as Act 10), which resulted in a reduction from five (5) collective bargaining units to one (1) unit.

As a former Human Resources Director, Ms. Maes has broad knowledge of all facets of local government operations, including law enforcement, public works, engineering, health services, and more. She has been active in numerous professional associations where she has held multiple leadership roles.

YEARS WITH FIRM: 12

EDUCATION

- Bachelor of Arts– Psychology, Luther College, Decorah, IA

PROFESSIONAL AFFILIATIONS

- Society for Human Resources Management
- National Public Employer Labor Relations Association
- World at Work, Total Rewards Association

CERTIFICATION

- Certified Compensation Professional (in process)

Michelle Lach
Project Consultant – Data

Ms. Lach provides critical research and analytical skills to our compensation and benefits studies. Ms. Lach had ten (10) years of professional human resources experience prior to her time with the Firm in the private sector as an HR Director for a manufacturing company and a pharmaceutical company. Her professional experience with the Firm includes the development of employee handbooks and job descriptions, but now works exclusively with compensation and benefit survey designs and execution, and market research. These critical responsibilities include obtaining, compiling, and analyzing complex data and other information for projects, and supporting the project manager as needed.

YEARS WITH FIRM: 21

EDUCATION

- Bachelor of Arts– Communication and Organizational Development
  Bowling Green State University, Bowling Green, OH
- Human Resources Program Certification – Baldwin Wallace College, Berea, OH

Melanie Henry
Project Consultant – Classification and Benefits

Since joining McGrath in December 2022, Melanie Henry has conducted compensation and classification studies for public sector organizations across the country. In her role as Project Consultant, she brings expertise in analyzing organizational structures, pay systems, and job classifications to deliver equitable, defensible, and sustainable solutions that support strategic goals and compliance requirements.

Prior to McGrath, Melanie served more than two decades as a human resources professional in both the non-profit and public sectors, including as Human Resources Director for a stand-alone public library in mid-Missouri. In that capacity, she led initiatives such as defined benefit retirement evaluations, paid leave conversion, timekeeping audits and system improvements, classification and compensation planning, and policy and employee development programs. She acted as Library Board liaison for executive director recruitment and annual performance evaluations, and guided leadership through a unionization effort and collective bargaining negotiations.

Melanie is active in the profession through SHRM, World at Work (Total Rewards), and the Human Resources Association of Central Missouri, where she currently serves on the board.

YEARS WITH FIRM: 2

EDUCATION

- Bachelor of Arts– Psychology, University of Missouri - Columbia
- Human Resource Management Certificate – University of Missouri – St. Louis

PROFESSIONAL AFFILIATIONS

- Society for Human Resources Management
- Human Resources Association of Central Missouri (HRACMO)
- World at Work, Total Rewards Association

Kristi Brashear

Project Consultant – Project Support and Job Descriptions

Kristi Brashear is a Project Consultant who delivers strategic human resources solutions to public-sector agencies. She specializes in classification and compensation studies, organizational assessments, benefits analysis, and policy development, ensuring recommendations align with best practices, fiscal responsibility, and each organization's unique culture and workforce needs.

With over 15 years of leadership experience in Texas municipal government as Director of Human Resources and Finance Manager, Kristi offers a comprehensive perspective on fiscal management and workforce dynamics. She is recognized for managing complex organizations, implementing effective policies, and leading initiatives that drive operational efficiency and long-term growth. Kristi leverages her combined experience in finance and human resources to ensure McGrath's recommendations are equitable, sustainable, and operationally practical for the organizations we serve.

During her tenure in local government, Kristi was an active member of the Government Finance Officers Association of Texas (GFOAT) and the Texas Municipal Human Resources Association (TMHRA), where she was deeply involved in advancing professional development and best practices in municipal government.

EDUCATION

- Associate degree - General Studies, Lone Star College

CERTIFICATION

- IPMA – Certified HR Professional

PROFESSIONAL AFFILIATIONS

- Public Sector Human Resources Association
- Society for Human Resources Management

PUBLIC SAFETY ADVISORS

McGrath Human Resources will partner with the parent company – McGrath Consulting Group in the areas of public safety, as needed.

- Dr. Tim McGrath has over 30 years of experience in fire, EMS, communications and emergency management and currently heads the Fire Division, performing operational studies throughout the United States. He served as Chief of fire departments in Gurnee, Illinois and Brookfield, Wisconsin. Dr. McGrath has been an independent consultant since 1997 and is a speaker well-known for his motivational presentations in the United States and internationally. He earned a doctorate in management, a dual master's degree in public administration and management, a bachelor's degree in industrial education, and an associate degree in fire science management.
- Ron Moser has over 30 years of experience in law enforcement serving six municipalities in three states. Serving as Chief for departments within a metropolitan area. Mr. Moser also served as Director of Emergency Management and Village Manager for Hanover Park, Illinois, a municipality of Cook County. He currently heads the law enforcement division performing operational studies throughout the United States. Mr. Moser has two master's degrees in Criminal Justice and Corrections and Law Enforcement Administration.

Part C: Project Approach and Work Plan

McGrath understands the City is seeking a comprehensive classification and compensation study, including benefits. We also recognize that, in any governmental organization, salaries and benefits are typically the largest budget item, and that this investment is ultimately an investment in your community. A competitive, well-structured compensation system is essential for the City's ability to attract, develop, and retain employees who provide high-quality service and value to all stakeholders.

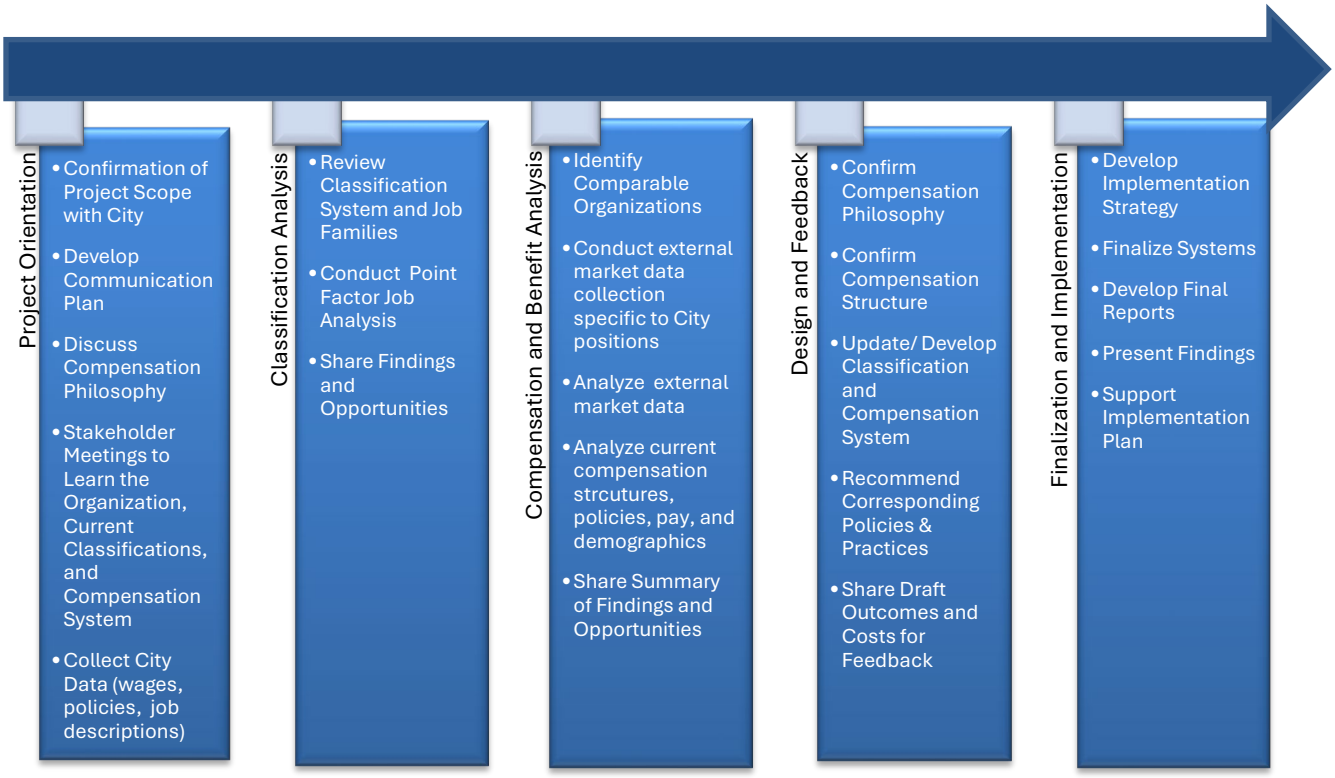
Our approach is an engaging, collaborative process designed to identify the City's compensation philosophy and determine the most effective model(s) to support it. We tailor our services to the City's unique structure and culture, beginning with a thorough needs assessment to identify the strengths, challenges, and constraints in the current system, followed by a multi-faceted review of existing classification structures, pay ranges, benefits, and related policies.

We understand that proper classification, internal equity, career opportunities, and the resolution of compression issues are critical in defining each employee's role, reinforcing their sense of value, and supporting their engagement in the organization's mission. Therefore, our goal is to help the City establish a system that promotes active employee engagement, is non-discriminatory, legally defensible, efficient to manage, and able to accommodate organizational growth and change.

Our methodology is grounded in best practices and characterized by a logical, objective, and transparent series of tasks to ensure thoroughness and consistency. In collaboration with City leadership, we define the City's compensation philosophy; analyze the current system; conduct a comprehensive market analysis using relevant public sector comparators; and utilize salary and job content data from multiple City sources and mutually identified comparators. This includes job analysis, compression analysis, and an internal equity review. We then synthesize this information into clear, meaningful summary formats, and use it to recommend a sustainable and competitive market position for the City.

Throughout the project, we will maintain an interactive process with City Administration, Department Directors and Managers, and employees, guided by a collaboratively developed communication plan. In addition to updating or developing a comprehensive compensation system, our consulting team will present recommendations to the City Council and employees, support the City through implementation, and provide the City Manager and leadership with the tools and training needed to successfully maintain these systems going forward. A visual summary of the project plan is provided.

Samples of a final report and job descriptions are provided on the flash drive of the proposal. Keep in mind the scope of work and needs of each client may differ from the needs of the City of Independence, IA.



Proposed Project Plan

We tailor our projects to meet the needs and unique structure and culture of your organization, with the principles of collaboration, communication and transparency in mind while developing a sound work plan with identified deliverables. The proposal steps can be discussed and adjusted to meet the projects needs for the City.

1. Project Orientation

Our Project Manager coordinates meetings, data sharing, and ensures the work plan is progressing according to the designed work plan so the deliverables are met within the scope and timeline of the project.

We develop a communication plan at the onset of the project so the Firm can provide routine updates on progress as well as discuss any issues that may result in a delay or a challenge within the project.

Our philosophy is to tailor each project to meet the needs, unique structure, and culture of your organization, with the principles of collaboration, communication and transparency in mind while developing a sound work plan with identified deliverables.

Initial project orientation with the City's project designee will include:

- Provide a list of documents and data needed to begin the project.
- Discuss project expectations and milestones.
- Begin developing a communication plan.
- Schedule initial meetings.

2. Project Initiation and Assessment

Our philosophy is to have direct conversations with management and administration to identify challenges and concerns with the current system and future needs; so we may develop comprehensive recommendations to best address those needs.

The consultants will conduct introductory meetings with City leaders and all Department Heads/Managers to:

- Explore your organization's current compensation system, compensation philosophy and strategy.
- Gain an understanding of the goals, values and structure of the overall organization.
- Gather information for each individual department including any unique responsibilities associated with positions, strengths and weaknesses of the current system, or issues with recruitment/retention.
- Identify future needs.
- Review provided documents and data.
- Finalize project communication expectations and strategies, project timeline, and identifiable milestones.

Communication with elected officials and/or employees during the project allows engagement and offers factual information.

Other Introductory communications are recommended:

- Conduct introductory meetings with elected officials to discuss elements of compensation philosophy and expectations.
- Introductory employee/union communications and/or meetings to explain the process of a compensation study, introduce the consulting team, expected assistance, describe the general outcome of the Study, and other related topics as desired by the City.

It is our belief that identifying and establishing a compensation philosophy allows for the development of strategic recommendations, such as placement in the market.

From the introduction meetings, the consulting team will identify:

- The strengths of the current compensation system.
- Areas that need to be addressed or are concerns to the current program.
- Future opportunities in structuring total compensation recommendations.
- Current compensation program success and challenges.
- Other characteristics about the City which may impact compensation.

Compensation Philosophy

An analysis of the information collected from these meetings, as well as external data collection will be the basis of developing a compensation philosophy with City Administration that will guide the design and complexity of the City's compensation program. A consistent philosophy will provide a strong foundation for the City. Without a philosophy, leaders often find themselves unsure what to offer as a total compensation package.

3. Classification Analysis

*Our philosophy is that job analysis is critical not only for internal equity, but also the establishment of a standardized classification system which will be used to establish **pay equity** between positions.*

Visit our link online to watch a brief video of our PQ process: https://youtu.be/OuTcURwtI0o

A **job analysis** objectively evaluates the duties, responsibilities, tasks, and authority level of each City position and identifies the hierarchy and career progression opportunities. This also supports pay equity.

The job analysis is recommended to include completion of a Position Questionnaire (PQ), which is a standardized tool used to analyze each position on identified factors. The **McGrath 360Comp**™ PQ has been developed **specifically for use in public sector** organizations **and is available as an online tool**. This Questionnaire is recommended to be completed by employees on all job titles for purposes of:

- Expounding upon information provided in job descriptions.
- Evaluating position responsibilities regarding necessary competencies, experience, education, finances, judgement, decision-making and other expectations which provide value to the City.
- Review the job description format and provide recommendations including clarifying instances where statements in the existing job descriptions are vague or absent.
- Updating and aligning classification changes.
- Identifying career progression opportunities.
- FLSA Designation.
- Job Description updates.

Supervisory Review/Verification. Each incumbent's supervisor or Department Head will be given time to review the completed PQ for content and accuracy, and to comment in a designated area of the document. They will sign off on their review prior to submission to the Consultants. If needed, the consulting team may speak with Department Heads, Supervisors, and Human Resources for additional position clarification.

Outcomes. From this process, the current classification system will be updated, as needed. The point factor system for job analysis is teachable, so our clients can

The **McGrath 360Comp**™ point factor process used to complete the job analysis goes beyond the typical "Knowledge, Skills and Abilities" (KSA's) and explores factors that are unique to public sector positions including the following aspects of a job:

- Records, Reports and Programs
- Impact of Decisions and Consequents of Errors
- Contact with Others (both inside and outside the organization)
- Equipment, Machines and Tools
- Budget, Financial, and Cash Handling
- Education, Experience, Licensure/Certifications
- Complexity and Judgment
- Confidential Data
- Stress (degree of mental or emotional fatigue or stress inherent to the job)
- Technology
- Leadership and Supervisory Responsibilities
- Work Environment and Physical Requirements

continue to use this methodology on their own should they choose. Compensation systems are more likely to be kept up-to-date and relevant which extends the lifecycle of a plan with this tool.

FLSA. We will evaluate each position status under the Fair Labor Standards Act (FLSA), to provide a recommendation to the client, based on actual job duties rather than job titles or salary alone. This ensures that positions are properly designated as exempt or non-exempt in accordance with federal wage and hour regulations. Accurate FLSA determinations not only reduce legal risk but also support consistent application of overtime and leave policies across the organization.

Job Description Document Updates/Development

The Position Questionnaire process will identify job description updates that may be needed. The Firm can either update the current job descriptions in their current format, or the Firm can completely rewrite all job descriptions with a tailored yet standardized and compliant format to meet the needs and desires of your organization. The template is developed cooperatively between the City and McGrath. Any documents developed will be submitted in draft form and one edit is included in the price before being turned over to the organization as final. This process is typically conducted at the end of the Study. The Firm acknowledges the City's desire for completion first and will discuss with the City the advantages and disadvantages of each timeline.

4. Compensation Analysis

A Compensation analysis determines the organization's relative position in the comparable labor market. This analysis allows City leaders to understand the organization's compensation as a whole and by position, allowing them to make sound compensation decisions. Compensation Analysis will consist of the following:

A market survey tool is developed specific to the City's positions. We believe that collecting fresh market data establishes a more accurate look of the current market. We do not utilize third-party market surveys unless requested or discussed with the client in advance.

- The City and consulting team will cooperatively **identify Comparable Organizations as the labor market.** The City will have input into the list and must approve the list of comparables prior to starting the external market data collection.
- McGrath consultants will **collect external market data** in real-time specific to the City's positions**.**
- The consultants will **analyze salary data**. The data collection process collects minimum, midpoint, maximum, and incumbent salary information for each benchmark position; and other data points as needed. A statistical analysis is conducted on each dataset to ensure consistent and objective analysis. The outcome is then calculated into a ratio between the market and the City to measure the City's alignment against the market.
- The consultants will examine the status of your current compensation systems including **structural analysis, special pay analysis, compression analysis, and incumbent pay analysis** to give guidance to the consultants for compensation and implementation recommendations and will also provide information to the City regarding overtime, promotional and retention opportunities, internal equity, **and how multiple pay plans are working together**.

- The consultants will **review your compensation-related policies** for compliance and best practices. We will make recommendations for policy updates or considerations that impact the City.

The consultants will also gather and analyze external and internal demographic data and workforce metrics to define:

- Employee's tenure within the organization as well as tenure in current position.
- Turnover rate for the organization.
- Local geographic and economic factors impacting the attraction and retention of employees.

Understanding your employee demographics and external challenges allows for the development of strategic recommendations.

The outcome of this portion of the project is very important because it identifies current trends and future predictors. This information guides the consulting team in developing strategy options and recommendations for the City's current and future needs.

5. Benefits and Rewards Analysis

Wages alone do not make up total compensation. A review of benefits in conjunction with wages allows the organization to see the total compensation picture.

Benefit data is also obtained in the data collection process with the identified labor market. The Consultants will analyze the findings and identify any trends and/or areas of concern as compared with the Market. A Benefits Analysis identifies the Client's position in the market for the offering of insurance, retirement, paid leave, holiday, and other benefits identified by the City. A Total Reward Inventory conducted with the client can also include a high-level review of employee well-being, professional development opportunities, and recognition opportunities, to understand the totality of the employee experience, and offer future opportunities to the client.

6. McGrath 360Comp™ Integration

Our philosophy is to help the City understand the full picture between the job analysis, compensation analysis, and summary market findings, which allows the City and consulting team to have a meaningful dialogue to confirm the desired place in the market, desired compensation system model, and other compensation solutions identified.

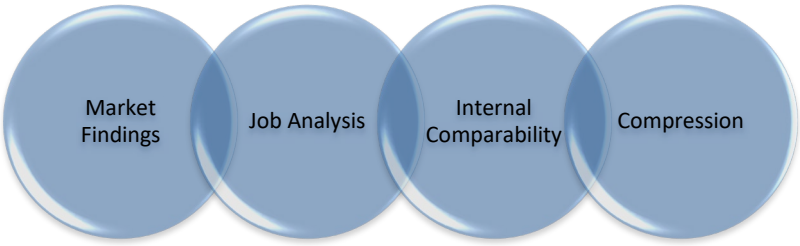
Upon completion of the compensation analysis and job analysis, etc. the consultants will engage the City to:

- Confirm the recommended compensation philosophy.
- Discuss the data market summary findings and trends found in the analysis as it compares to the current Compensation System.
- Discuss the future compensation system.
- Discuss the tie between the compensation system, performance, and tenure, and provide recommendations to strengthen the City's desired compensation model.

7. Classification and Compensation Systems Update and Review

Allowing City leaders and department directors the opportunity to review our recommendations in advance of finalization provides an opportunity for dialogue and sound quality control.

The Classification and Compensation Systems will be updated or redeveloped with the following information:



The consultants will develop a **detailed fiscal impact** of the Compensation Systems and will present **implementation strategy options** that fit the fiscal needs, culture, and compensation strategy of the City. While some entities can fully implement the compensation systems immediately, some clients have utilized a phased approach. **Compression relief may also be a factor in this process**. We will work with the City to ensure that any phased approach fits with best practices and your fiscal realities. The proposed price includes up to three (3) costing iterations.

Once the System is updated, the consultants will meet with appropriate City personnel to **review the draft Compensation System(s)**. This visit will include meetings with the City's project designee and each Department Director to review placements to identify any concerns prior to finalization. This provides an opportunity to discuss any concerns in placement in the current system and/or ensure proper placement if the System(s) are redesigned.

Policy and Maintenance Recommendations

In addition to developing a recommended compensation and classification structure (system), the consulting team will provide the organization with the following:

- Compensation Policy recommendations
- Recommendations for the maintenance of the Structure
- Recommendations for position changes
- Future Market Update recommendations
- Metrics recommendations

8. Finalization

The City will receive the Compensation and Classification documents and cost estimates in editable format for the City to maintain/integrate.

Reports will be developed based upon the needs of the project. The reports provide varying details on:

- Study methodology and summary findings and visual summary charts.
- Recommended compensation structure modifications.
- Recommended position title, classification specification or career progression changes.
- Fiscal impact and implementation strategies.

- Policies and procedures recommended to administer and maintain the system in-house going forward.

Union Reports may also be developed, as needed.

All reports will first be provided to the Administration in draft form to allow for feedback before they are placed into final form and provided electronically.

9. Presentation and Communication

We stand behind our methodology and process, and recommendations. We are available to present findings to the oversight committees, City Council, and Employees.

The Study includes a **presentation to City Council and employees.**

The consulting team will work with the organization to discuss the preferred communication plan and introduce the recommendations to employee groups to the depth, and in the manner, you prefer and offer suggestions and recommendations on how to best communicate this information. We prepare correspondence and notices tailored to our client, whether for written, verbal or electronic presentation.

10. Ongoing Support and Training

We will continue to assist the City through implementation.

We embrace client independence. We will train leadership and provide the tools necessary for self-maintenance, if desired by the City.

McGrath Human Resources Consultants will continue to work with your organization to provide ***support and guidance*** on the compensation system at no additional cost.

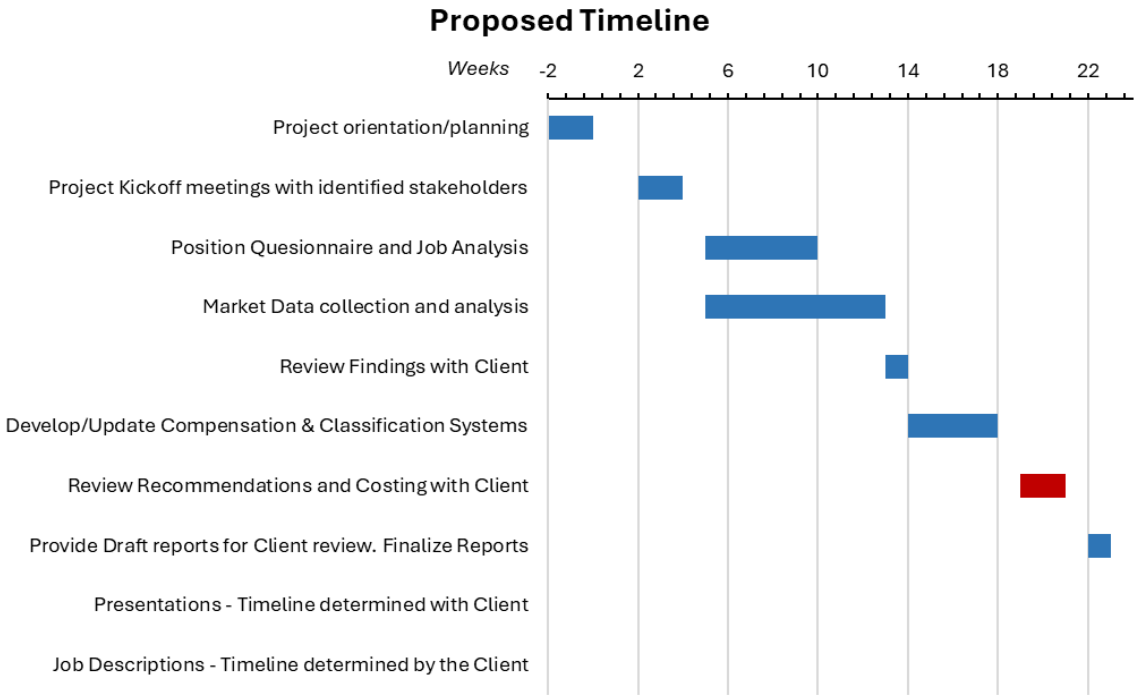
The City may also consider its future needs as follows:

- McGrath Human Resources believes in providing our clients with the tools to be able to manage their Compensation System independently if the client desires. In addition to policy recommendations to manage and maintain the Compensation System, we offer to teach City leadership the point factor/position analysis process.

- Alternatively, some clients prefer that McGrath Human Resources set current and future pay grade placements, position changes, and job description development rather than completing that in-house. This can be done for a nominal fee depending upon the time involved in the placement.

Work Schedule

Based on the size and scope of the project, the expected timeline is customarily up to a 5-month process. The tasks below align to the Detailed Work Plan. Fiscal outcomes are highlighted in red. We recommend the following:



This timeline will be adjusted based on the agreed upon Project Initiation date. There are factors that impact this schedule that may be out of the control of the consultants. The proposed time frame is contingent upon timely receipt of data from the City, timely participation from external comparable organizations; and timely receipt of information and/or feedback from the City. This is monitored by the consulting team and communicated with the City on an ongoing basis.

Project Progress Communication

Since we work closely with our clients, open communication and collaboration between the consulting team and project designee is critical for the project to be most successful. Because of that, we will develop a communication plan at the onset of the project so the Firm can provide routine updates on progress as well as discuss any issues that may result in a delay or a challenge within the project. Our designated project manager coordinates meetings, data sharing, and ensures the work plan is progressing according to the designed work plan so the deliverables are met within the scope and timeline of the project.

Part D: References

McGrath Consulting is proud to list over 620 clients. Below are a few compensation studies either within the region and/or are similar to your project **Additional client names, projects and locations are viewable on our website at www.mcgrathhumanresources.com** and their contact information will be provided upon request. Note: We are currently engaged with the Polk County, IA Assessors office.

Municipality	State	Contact Information	Project Description
City of West Des Moines	IA	Contact: Megan Thole Title: Human Resources Director Phone: 515-222-3583 Email: megan.thole@wdm.iowa.gov	Developed a comprehensive compensation and classification system for all positions within the City in 2024.
City of Plymouth	WI	Contact: Tim Blakeslee Title: City Administrator/Utilities Manager Phone: 920-893-3745 Email: TBlakeslee@plymouthwi.gov	Developed a new compensation and classification system for the city in 2025 that included general employees, public works, and electric utility. Benefits were also included in the project.
City of Union	MO	Contact: Jonathan Zimmerman Title: City Administrator Phone: 636-583-3600 Email: cityadministrator@unionmissouri.gov	Developed a new compensation and classification system for the city in 2023. This is a small city in the St. Louis market.
City of Washington	MO	Contact: Shauna Pfitzinger Title: Human Resources Manager Phone 636-390-1002 Email: spfitzinger@washmo.gov	Developed a new compensation and classification system for the city in 2024, inclusive of a benefits review. Job description redevelopment was also included in the project. This is a small city in the St. Louis region.
City of Bonner Springs	KS	Contact: Amber Vogan, CPM Title: Interim City Manager Phone: 913-667-1719 Email: avogan@bonnersprings.org	A Comprehensive classification and compensation schedule system for all city positions was developed. Benefits were included in the project. Job descriptions were also updated as a part of the project.
City of Carthage	MO	Contact: Traci Cox Title: Assistant City Administrator Phone: 417-237-7000 Email: tcox@carthagemo.gov	A comprehensive compensation and classification system for all city positions and implemented in 2020. Market update completed in 2025.
City of Excelsior Springs	MO	Contact: Molly McGovern Title: City Manager Phone:816-630-0752 Email: mmcgovern@excelsiorsprings.gov	Comprehensive compensation, classification, and benefits analysis was completed with development of new salary schedule for non-union and union in 2022. Performance Management project was completed in 2022. Market update completed in 2024. This is

			a small city in the Kansas City market.
City of Florissant	MO	Contact: Sonya D. Brooks-White Title: Human Resources Director Phone: 314-839-7623 Email: swhite@florissantmo.com	Developed a new compensation and classification system for the city in 2024. This is a small city in the St. Louis market.
City of La Vista	NE	Contact: Wendy Lowery Title: Human Resources Director Phone: 402.331.4343 Email: wlowery@cityoflavista.or	A Comprehensive classification and compensation system or all city positions was developed. Benefits were included in the project. The city is part of the Omaha market.
City of Merriam	KS	Contact: Stephanie Thompson Title: Human Resources Manager Phone: 913-322-5502 Email: sthompson@merriam.org	Comprehensive compensation, classification, and benefits analysis was completed with development of a new system effective 2023. A market update was completed in 2025. This is a small city in the Kansas City market.
City of Monroe	WI	Contact: Brittney Rindy Title: City Administrator Phone: 608-329-2527 Email: brindy@cityofmonroe.org	Developed a new compensation and classification system for the city in 2023. Benefits were also reviewed. Job description redevelopment was also included in the project.
City of Nevada	MO	Contact: Sharon Baker Title: Human Resources Director Phone: 417-448-5106 Email: sbaker@nevadamo.gov	Comprehensive compensation. Classification and benefits analysis was completed with development of new system effective 2026.
City of Newton	KS	Contact: Daniela Rivas Title: City Manager Phone: 316-284-6001 Email: drivas@newtonkansas.com	Developed a new compensation and classification system for the city in 2025, based on a compensation philosophy of the 60th Percentile. Benefits were also reviewed.
City of North Kansas City	MO	Contact: Casey Campbell Title: Human Resources Manager Phone: 816-412-7809 Email: ccampbell@nkc.org	Comprehensive compensation and classification analysis was completed with development of new a compensation system at the 60th Percentile, in January 2023.
City of Northfield	MN	Contact: Michelle Mahowald Title: Human Resources Director Phone: 507-645-3012 Email: michelle.mahowald@ci.northfield.mn.us	A comprehensive compensation schedule for union and non-union positions was developed into one (1) system, and job descriptions were updated. This Compensation system had to be compliant with the State of Minnesota's Pay Equity Act. Northfield is in the Minneapolis-

			St. Paul metropolitan area. A market update occurred in 2024.
City of Ogden	UT	Contact: Heather Briskey Title: Human Resources Director Phone: 801-629-8736 Email: HeatherBriskey@ogdencity.com	Developed a new compensation and classification system for implementation for the City's 2025 fiscal year. The community is part of the Salt Lake City metro region.
City of Ottawa	KS	Contact: Michelle Stegman-Jacobson Title: Human Resources Director Phone: 785-229-3635 Email: mstegman-jacobson@ottawaks.gov	A Comprehensive classification and compensation schedule system for all city positions was developed. The community is part of the Kansas City market.
City of Prairie Village	KS	Contact: Cindy Volanti Title: Human Resources Director Phone: 913-385-4664 Email: cvolanti@pvkansas.com	A Comprehensive classification and compensation system or all city positions was developed. Benefits were included in the project.
City of Raymore	MO	Contact: Shawn Aulgur Title: Human Resources Director Phone: 816-892-3005 Email: saulgur@raymore.com	A Comprehensive classification and compensation schedule system for all city positions was developed. Benefits were included in the project. The community is part of the Kansas City market.
City of Saratoga Springs	UT	Contact: Laura Gamon Title: Human Resources Director Phone: 801-766-9793 Email : lgamon@saratogaprings-ut.gov	An audit of current compensation system including recommendations to determination of comparables, future data analysis, and systems to adjust for compression and internal equity was conducted in 2024.
City of Sequim	WA	Contact: Emily Stednick Title: Human Resources Director Phone: 360-681-3423 Email: estednick@sequimwa.gov	Developed a new compensation and classification system for all non-union positions. A market update is occurring in 2025.
City of Webster Groves	MO	Contact: Dr. Marie Peoples Title: City Manager Phone: 314-963-5303 Email: peoplesm@webstergrovesmo.gov	Developed a new compensation and classification system for the City in 2021, inclusive of updating job descriptions. Conducted a market update and FLSA review in 2025. The City is part of the St. Louis market.
City of West Bend	WI	Contact: Michelle Hoey Title: Human Resources Director Phone: 262-335-5107 Email: hoeym@ci.west-bend.wi.us	A comprehensive compensation system for non-union was developed in 2022. Ongoing services for new position or position changes occur as needed collaboratively with Human Resources. The City is part of the Milwaukee market.

City of West Chester	OH	Contact: Tonya Pointer, Title: Human Resources Director Phone: 513-759-7213 Email: tpointer@westchesteroh.org	Developed a comprehensive classification and compensation system for all City positions.
Village of Mount Pleasant	WI	Contact: Mary Cole Title: Human Resources Director Phone: 262-664-7837 Email: mcole@mtpleasantwi.gov	Comprehensive compensation schedule was updated in 2019 for market and organizational restructuring resulting in significant position adjustments. Job Descriptions were also developed in 2019. Market updates conducted are regularly conducted (2022 and in 2024) with the development of a new range progression model in 2024. The Village is a small community in the Milwaukee market.
Village of Rib Mountain	WI	Contact: Gaylene Roden Title: Village Administrator Phone: 715-679-8334 (Direct) Email: grhoden@ribmountainwi.gov	Developed a comprehensive compensation and classification system in 2023 when the Village brought the public utility into its services.
Polk County	IA	Contact: Ella McGowan Title: Compensation Administrator Phone: 515-86-3201 Email: ella.mcgowan@polkcountyiowa.gov	Comprehensive compensation schedule was developed combining non-represented, multiple unions, elected and appointed salary schedules.
Columbia County	WI	Contact: Jodi Burmania Title: Human Resources Manager Phone: 608-742-9669 Email: jodi.burmania@columbiacountywi.gov	Comprehensive classification and compensation study was completed in 2024 for non-union classifications. Implementation started 2025.
Douglas County	KS	Contact: Michelle Spreer Title: Human Resources Manager Phone: 785-832-5149 Email: mspreer@dgcoks.gov	Comprehensive classification and compensation schedule was developed in 2024.
Green County	WI	Contact: Delores Merrick Title: Human Resources Director Phone: 608-328-9655 Email: dmerrick@greencountywi.org	Comprehensive classification and compensation study was completed in May 2024 for non-union classifications with a July 2024 implementation. A benefits review against the market was also included. Union data collection was included for negotiation purposes.
Harvey County	KS	Contact: Heidi Huber Title: Human Resources Director Phone: 316-284-6810 Email: hhuber@harveycounty.com	Completed a comprehensive compensation study for all positions within the county. This is part of the Wichita, KS market.
Juneau County	WI	Contact: Mechelle Thompson Title: Human Resources Director	A Comprehensive classification and compensation study was

		Phone: 608-847-9344 Email: mthompson@juneaucountywi.gov	completed in March 2024 for non-union classifications. Implementation started July 2024.
Marathon County	WI	Contact: Molly Adzic Title: Human Resources Director Phone: 715-261-1406 Email: molly.adzic@marathon.wi.us	Comprehensive classification and compensation schedule was developed in 2022 for non-union job classifications, inclusive of regionalized IT and ADRC departments. A Market update for 2025 has been conducted.
Minnehaha County	SD	Contact: Carey Deaver Title: Director of Human Resources Phone: 605-367-4337 Email: cdeaver@minnehahacounty.gov	Comprehensive compensation and classification system for non-union and union positions was developed. Union recommendations were developed for the negotiation process. Total Rewards analysis also included.
Oconto County	WI	Contact: Shelly Schultz Title: Human Resources Director Phone: 920-834-6810 Email: shelly.schultz@co.oconto.wi.us	A comprehensive classification and compensation study was completed in early 2025 for all classifications. Implementation is scheduled for October 2025.
Portage County	WI	Contact: Laura Belanger-Tess Title: Human Resources Director Phone: 715-346-1369 Email: belangl@co.portage.wi.us	Comprehensive compensation schedule was developed with benefit recommendations for non-union job classifications, inclusive of a skilled nursing facility. A Market update occurred in 2022.
Sauk County	WI	Contact: Anna Cooke Title: Human Resources Director Phone: 608-355-3271 Email : anna.cooke@saukcountywi.org	Comprehensive classification and compensation schedule was developed in 2023 for non-union job classifications, inclusive of a skilled nursing facility.

Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY. List Addenda Numbers received:

   Addendum 1

   Addendum 2

2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:

Printed Name: Victoria J. McGrath, Ph.D.

Title: CEO

Date: November 12, 2025

AutoSolve, Inc.

Request For Proposal:

Classification and Compensation Study
City of Independence
331 1st Street E
Independence, IA 50644

Due: 11/20/2025 at 4:00pm.

Technical Proposal Submitted By:

AutoSolve, Inc
46 Thatcham Drive
Saint Augustine, Florida 32092

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Cover Letter

November 18, 2025

Matthew R. Schmitz, City Manager
Classification and Compensation Study
City of Independence
331 1st Street E,
Independence, IA 50644
Phone: 319-334-2780 Email: mschmitz@independenceia.gov

Re: Classification and Compensation Study

Dear Matthew,

Thank you for the opportunity to submit a proposal to develop a Classification and Compensation Study for the City of Independence. The proposed study will provide City of Independence with an equitable and competitive classification and compensation system for approximately 114 employees and 55 classifications. Based on the information provided, AutoSolve will complete the study within 4 months of the start date and the target completion date is 4/24/2026.

AutoSolve, Inc. (AutoSolve) is a Human Resources Consulting firm providing services to private and public agencies for more than 30 years. We pride ourselves and attribute our successes to our team's ability to listen, collaborate, and communicate effectively with clients. We will work effectively with your team to develop a custom pay plan that is both internally equitable and externally competitive.

All work will be performed by AutoSolve employees. Key resources will be dedicated to the City of Independence study until all work has been completed. We look forward to partnering with the City of Independence. This proposal is valid for ninety (90) days from the date of submission.

Thank you for your time and consideration,

Jeff Turner, President
AutoSolve, Inc.
Authorized representative
321-945-8762 I jeff@autosolveinc.com

Background

AutoSolve, Inc. (AutoSolve) is a strategic Human Resources consulting firm headquartered in Saint Augustine, Florida. The firm specializes in business strategy for human resource management, classification and compensation studies, organizational design, business process re-engineering, and strategic planning.

1,000 Clients + 30 Years Experience

Municipalities – County Governments – Higher Education Institutions – K-12 School

Classification and Compensation Experts with Public Sector Focus

For over 30 years, AutoSolve has been providing value through dedication, entrepreneurial spirit, and professionalism to over 1,000 public and private sector clients. AutoSolve provides tailored made solutions to meet the ever-changing needs of our clients. AutoSolve has been serving local governments and other public sector organizations since its inception.

AutoSolve understands that state and local government organizations operate in a complex environment shaped by fiscal, regulatory, and operational hurdles not commonly found in other industries. AutoSolve provides expertise in organizational design and compensation structure that addresses our client's individual needs. AutoSolve's methodology, proprietary technologies, and expertise allows for a precise and targeted approached to compensation and classification analysis, review and recommendations.

Core Values

We work hard be a trusted business partner with all clients.

Our core values guide the way AutoSolve makes decisions and conducts business. Employees exemplify core values in their work with clients and in their personal lives. The values illustrated below drive the way we live and work.

PASSION
Drive to achieve our goals.

INTEGRITY
Do the right thing.

PROFESSIONALISM
Bring value, quality, skill, credibility, and customer service.

RESPECT
Treating others how you want to be treated.

Sample of Recent Relevant Projects

The following is a sample list of recent relevant classification and compensation projects.

Sample of Classification and Compensation Projects	State	Employees	Classification / Job Titles
City of North Miami Beach	FL	294	60
Leon County Clerks of the Circuit Court	FL	124	57
Orange County	FL	2,841	260
Athens-Clarke County (Fire Dept)	GA	174	9
City of Americus	GA	153	77
City of Fayetteville	GA	180	85
City of Rincon	GA	117	53
Madison County	GA	459	98
Fayette County Public Schools	KY	3,504	230
City of Hagerstown	MD	125	48
City of New Prague	MN	57	38
Kansas City Public Schools	MO	2,500	359
Liberty Public Schools	MO	993	127
Raytown C-2 School District	MO	637	130
Town of Rolesville	NC	120	44
City of Boulder City	NV	1,520	160
Carbon County	PA	386	198
Florence School District 3	SC	495	89
Lex-Rich District 5	SC	964	137
Rock Hill Schools	SC	2,400	254
Bedford County	VA	169	81
Brunswick County	VA	229	80
Charlottesville City School District	VA	1,000	182
Dinwiddie County	VA	470	162
Goochland County	VA	296	163
Harrisonburg City Public Schools	VA	960	226
School District of Beloit	WI	758	218

Contact Information Project Leadership

Company – Florida S Corporation: AutoSolve, Inc.
Date of Incorporation: 11/4/1993
FEIN: 59-3212545
Primary Contact: Jeff Turner
Phone: 321-945-8762 Email: jeff@autosolveinc.com
Address: 46 Thatcham Drive, Saint Augustine, Florida 32092
Website: https://autosolveinc.com/
Contract Relationships: All work will be performed by AutoSolve employees.
E-Verify #: 2613061

AutoSolve is a Florida Corporation providing services for over 30 years. AutoSolve is in good standing, financially stable, and has no past or pending litigation.

AutoSolve is insured with Hartford Insurance company

Workers' Compensation:	Statutory Limits
Commercial General Liability:	$2,000,000 per occurrence
Professional Liability (Errors & Omissions):	$1,000,000 per occurrence
Automobile Insurance:	$2,000,000 per occurrence
General Aggregate:	$4,000.000

Project Leadership

Jeff Turner, PMP, BS Computer Science – Project Manager

Jeff Turner, PMP founded AutoSolve, Inc in 1993. Jeff is a strategy leader who has worked in the management consulting field for the past 30 years, delivering value driven results to over 1,000 public and private sector clients. Jeff provides sound strategic insight to AutoSolve's consulting practices. He has developed highly successful management solutions and methodologies targeted at executive leaders and public sector organizations to build value with a focus in human resource management, classification and compensation studies organizational design, business process reengineering, policy design, strategic planning, and succession planning.

Jeff specializes in developing and delivering Human Resource solutions and will serve as the main contact and Project Manager for the classification and compensations study.

Jeff holds a Bachelor of Science in Computer Science from the University of Southern Maine.
Jeff earned his Project Management Professional (PMP) Certification from the Project Management Institute in 2002. Jeff earned his Agile Project Management SAFe RTE Certification from Scaled Agile Inc.
Jeff is a Society for HR Management Professional (SHRM).

Project Team

Alex Turner, MS Finance – Senior Compensation Consultant

Alex Turner has 6 years of experience in studying public sector labor markets, and micro and macroeconomic events. Through his experience Alex has provided classification and compensation studies, market research summaries, staffing studies, performance reviews and gender and race audits to over 70 different local governments, K-12 public school districts, and higher education institutions across the country. He has extensive experience in analyzing, developing, and updating compensation and classification plans, and policies for organizations. Alex's expertise includes data analytics, financial modeling and forecasting, strategic planning, and management reviews.

Alex will provide quantitative analysis on the classification and compensation study. Alex has been instrumental in improving the overall delivery of the classification and compensation study processes. He has updated the survey data collecting techniques, classification compensation data model, implementation options model and the pay plan recommendation strategy.

Alex holds a Master of Science in Finance along with a Bachelor of Science in Finance and Minor in Economics from Florida State University.

Sidney Turner, MS English – Senior Consultant

Sidney Turner has over 7 years' experience in conducting research, organizational design, and education. Sidney has developed and implemented multi-faceted long-term strategies designed to achieve organizational goals for high education institutions. Sidney's expertise includes research and evaluation, efficiency reviews, survey and polling, survey analysis, risk analysis, and technical communication. Sidney has created frameworks for briefing sessions, focus groups and surveys to gain employee acceptance though effective communication. Sidney is our employee engagement expert.

Sidney will provide the qualitative analysis on the classification and compensation study. Sidney has improved the effectiveness of survey execution process to elicit a higher response rate from employees. Her approach to survey analysis allows for a clear understanding of the organization culture and the resulting summary recommendations provide actionable feedback.

Sidney holds a Master's in Rhetoric and Composition, and a Bachelor of Science in Political Science and Literature from Florida State University. Sidney is a PhD. Candidate at Syracuse University.

Chris Young, BS Information Technology - Systems Analyst

Chris Young has 7 years of systems analyst experience. Chris maintains AutoSolve's secure cloud survey platform providing a quality customer centric experience for the organization survey and the individual employee survey. Chris expertise includes data analysis and management, survey and polling, and survey analysis.

Chris is AutoSolve's full stack software engineer who has improved the survey process by developing the AutoSolve survey secure cloud platform. The survey platform has provided AutoSolve with the ability to customize the survey to each of our clients' specific needs allowing for quality data collection.

Chris holds a Bachelor of Science in Information Technology and Minor in English from Florida State University.

Executive Summary

At its core, the aim of a classification and compensation study is to align your people strategy with your business strategy. The AutoSolve team recognizes the importance of optimizing your workforce for today while proactively planning for future resource needs. To achieve this, AutoSolve approaches classification and compensation studies as a two-pronged process.

First, we perform an in-depth analysis of your organization's current classification and compensation structure, focusing on the pay relationships and hierarchy between each classification. Our analysis of your organization's current and future planned classifications allows us to organize and recommend appropriate updates to your classification system. This phase of the study is an opportunity to define pathways for employee growth, eliminate unnecessary classifications, and ensure alignment with business needs. AutoSolve is committed to delivering a streamlined and effective classification system that will serve your organization for years. Classification job descriptions will be updated and reviewed to ensure they are legally compliant following the Fair Labor Standards Act (FLSA) and the Americans with Disabilities Act (ADA) requirements. We will also ensure the job descriptions are internally aligned, accurately illustrating the classification's current responsibilities, duties, and qualifications

Employee engagement is a key focus of this study. The organizational survey functions as a tool to collect qualitative data and insights about the organization, management, culture and work environment. The primary objective of the survey is to gather feedback directly from employees to share with the management team. This feedback reflects employee sentiment, including both praise and suggestions for improving the workplace environment. AutoSolve delivers a report outlining the core takeaways from the survey analysis, organized into 3 categories: "Workplace Culture," "Infrastructure," and "Relationships with Leadership." Informed by employee responses, we also include "Opportunities for Improvement," which highlight specific material changes and goals that could positively impact the organization's culture and employee experiences.

Second, we perform market research to collect relevant comparable salary data from your regional operating market to accurately assess your external pay competitiveness. The selection of peer agencies is a critical step in the study process. We collaborate with you to identify appropriate peers and will receive approval before proceeding with the compensation survey.

Deliverables

We will create a well-organized pay plan system that fits your organization's objectives and budget while being viewed internally equitable and externally competitive.

Our commitment to you

Throughout the study, AutoSolve emphasizes transparency and provides the necessary level of detail to inspire confidence in the accuracy of the evaluation and its outcomes. Our proposed timeline includes weekly project team status update meetings, with the flexibility to schedule additional meetings as needed. These meetings serve as a space to ensure transparency throughout the duration of the study. Furthermore, they are crucial to AutoSolve's collaborative and interactive approach, which enhances the study results and your organization's experience.

The AutoSolve team understands that every organization is different and has their own unique goals and concerns. As such, we strive to provide a tailored made pay plan system addressing your organization's individual wants and needs. The following objectives and methodology outlined in this document serve as a road map of the classification and compensation study.

Communication and Interaction

AutoSolve schedules weekly status meetings for the duration of the study. AutoSolve also provides a detailed work plan that is updated weekly, keeping all stakeholders informed on where we are during each phase of the study. These steps ensure that the study results are accepted and trusted by all levels within the organization. Our collaborative approach ensures a greater understanding of the organization's current needs leading to exceptional study experience with results that are impartial and fair.

Stakeholder Engagement

- Initial study kickoff meeting to review the process and tasks to be performed by the study.
- Weekly touchpoint meetings to discuss the project and review the work plan.
- Jointly agree on comparable agencies to be surveyed.
- Schedule as needed meetings with management and department heads to discuss additional project details.
- Review each section results as they are completed throughout the study.
- Classification review.
- Pay plan review.
- Stakeholder input on compensation philosophy.
- Implementation review.

Study Goals, Objectives, Scope

The goal of the study is to address changes in operations and staffing over the past several years, which may have affected the type, scope, and level of work being performed.

The study will address and resolve recruitment, retention, and compression issues.

- Recruitment becomes difficult when compensation is not competitive or equitable and it is challenging to attract and retain qualified candidates.
- Compression arises when hiring new employees at the same or higher salary than existing employees, creating wage compression. Compression can also occur when equitable pay increase is not provided across the organization.
- Employee Engagement improves when employees are compensated fairly, they will engage and be committed to their job and organization.

Objective

- Attract and retain qualified employees.
- Ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together.
- Provide salaries commensurate with assigned duties.
- Clearly outline promotional opportunities and provide recognizable compensation growth.
- Provide justifiable pay differential between classes.
- Maintain a competitive position with comparable government entities.

Scope of Work

- Conduct a classification, compensation and benefit study for approximately 114 employees, and approximately 55 classifications / job titles.

  The study will include all the City's operational departments, including Administration, Building & Code Enforcement, Fire, Police, Public Library, Parks & Recreation, Streets, Utilities (Water/Wastewater), and the Municipal Airport.

  Project Initiation and Orientation
  - Kick-off and Planning
  - Document Review
  - Communication Plan

  Classification and Job Analysis
  - Job Analysis Process
  - Job Description Development
  - Classification Plan

  Compensation and Benefits Analysis
  - Compensation Philosophy and Market Identification
  - Market Survey and Analysis
  - Pay Plan Development

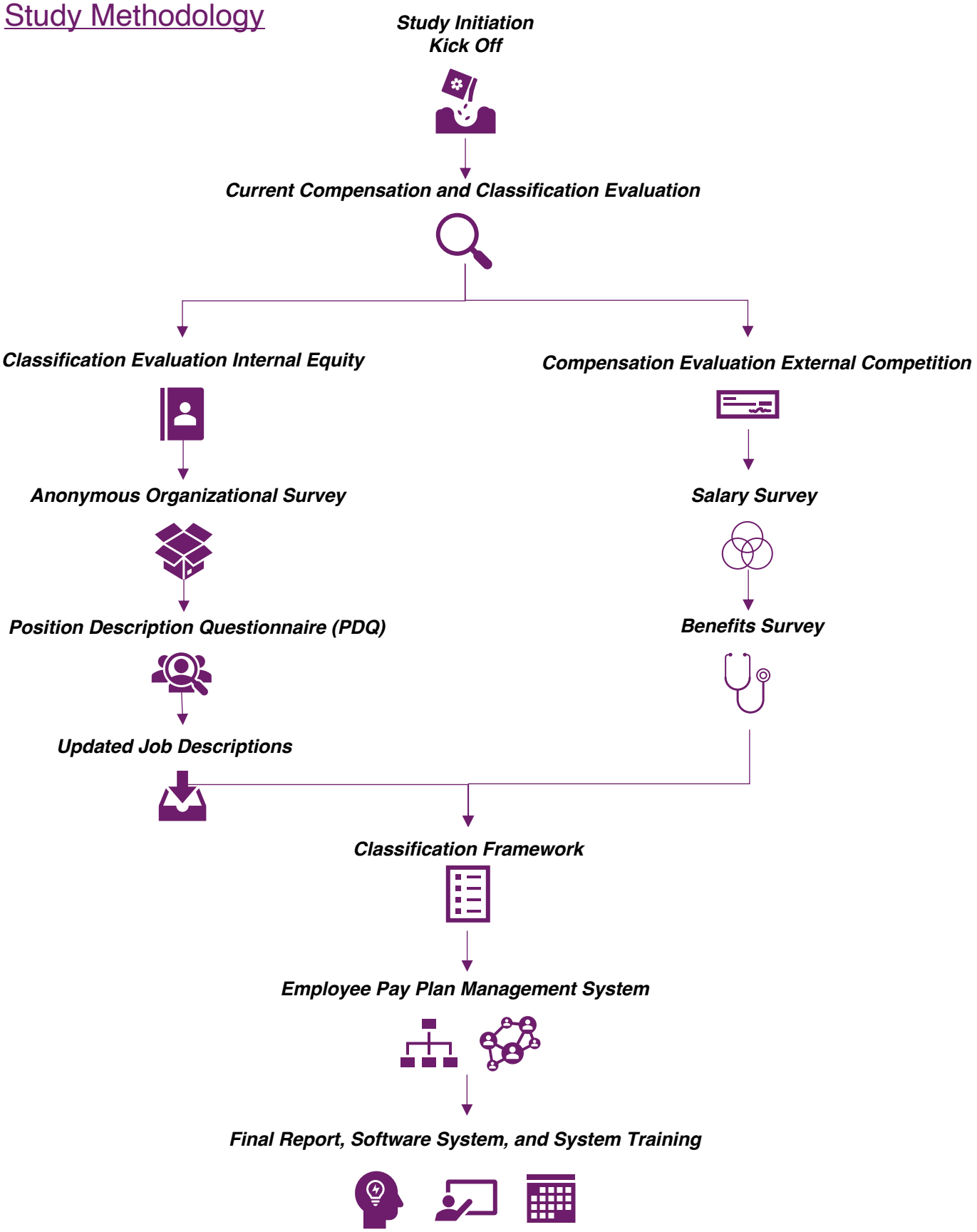
  Final Reporting and Implementation
  - Fiscal Impact and Implementation
  - Final Report and Job Descriptions
  - Presentation and Training

Peers for the City of Independence

AutoSolve is very familiar with the local government agencies in this region. The following is a sample list of potential peers for this compensation and classification study. We will collaboratively determine the peer list, consisting of 10 to 20 comparable organizations for surveying.

Sample of Relevant Peers	State	Population	Distance (Miles)
City of Independence	**IA**	**6,149**	**0.0**
Buchanan County	IA	20,714	1.7
City of Cedar Falls	IA	40,746	33.2
City of Cedar Rapids	IA	136,429	39.1
City of Evansdale	IA	4,530	22.5
City of Manchester	IA	5,335	23.1
City of Oelwein	IA	5,665	15.0
City of Waterloo	IA	67,314	25.4
Delaware County	IA	17,488	24.2
Fayette County	IA	19,294	35.6

Study Methodology



Study Methodology Breakdown

The following breaks down each step of AutoSolve's methodology in performing a compensation and classification study.

Study Initiation / Kick Off

Planning Discussion
The study kickoff meeting sends the signal to all stakeholders that the project has started. We will take this opportunity to provide team introductions, align on key objectives and establish working relationships.

Tasks

- Meet with organization's project team (human resources, associations, unions, and/or key leadership staff) to validate and finalize scope of service, methodology, timetable, and other key deliverables.
- Review work plan methodology for the study.
- Collect current pay plan data including but not limited to employee classifications, employee compensations, employee tenure details; job descriptions; organizational charts; collective bargaining agreements; policy handbook, benefit offerings; etc.
- Review and validate communication plan.
- If needed, additional orientation and briefing sessions will be scheduled to present the project objectives and to address questions/concerns.

Deliverable: Work plan detailing tasks and timeline.

Current Compensation and Classification Evaluation

Current Compensation Review – Pay Compression Analysis
A key foundational step to this study is AutoSolve's review of the organization's current classification and compensation system. This review allows AutoSolve to make observations and provide best practice recommendations that lead to a clear and concise pay plan.

Tasks

- Analyze the organization's work force based on classification, tenure, pay grade, and current annual/hourly salary.
- Analyze the number of classifications utilized.
- Analyze how an employee fits within their current pay grade. Quartile analysis based on employee's current salary with respect to their assigned salary range and relative to their tenure within the organization.
- Analyze pay compression relative to an employee's current salary and their calculated hire year salary.
- Analyze pay compression relative to an employee's salary and their supervisor's salary.
- Meet with the organization's project team to discuss the pay plan/philosophy.
- Identify current issues affecting the compensation system that will be corrected by AutoSolve.
- Provide recommendations to better align client pay plan system to current best practices.

Deliverable: Report outlining and illustrating the current workforce classification system and pay plan. The report will also provide recommendations to align the organization's pay plan system with current best practices.

Classification Evaluation - Employee Engagement - Internal Equity

Employee Engagement – Survey - Position Description Questionnaire - Updated Job Descriptions
We foster employee engagement by conducting an organizational survey and position description questionnaire (PDQ) to gather employee feedback. We provide employees an electronic version of our survey and PDQ via a survey link.

The **anonymous organizational survey** helps us to understand the employee sentiment within the organization putting forth questions that will provide insight on an organization's culture.

The **position description questionnaire (PDQ)** identifies current job responsibilities, duties, education level, required certification, etc. for each classification involved within the study. The PDQ is the basis for performing job audits, correct compression, conducting our internal hierarchical framework, and updating job descriptions.

Both survey and PDQ are conducted in our secure cloud survey software platform providing a quality customer centric experience. We will conduct employee focus group and department head interviews as needed.

Tasks

- Meet with the organization's project team to review and schedule the organizational survey and position descriptions questionnaire (PDQ).
- Provide survey and PDQ link to all employees in the study.
- Employees complete online organization survey and PDQ.
- Summarize results from organization survey and analyze the PDQ data.
- Meet with the management team to determine classifications with retention, hiring, and/or compression issues.
- Ensure position descriptions are in full compliance with all applicable federal, state, local statutes, and regulations, including the FLSA and Americans with Disabilities Act (ADA).
- Update job descriptions utilizing the findings from the PDQ survey and recommendations form the organization's project team.
- Review updated job descriptions with the organization's project team and make revisions. Provide final job descriptions in word format after the completing revisions.

Deliverable: Report summarizing the organizational survey results. Updated job descriptions.

Compensation Evaluation – Salary Survey - External Equity

Data Collection – Market Research Compensation
Collecting relevant market data in your organization's operating market is key to creating an externally competitive compensation system. All data collected is adjusted for cost of living provided by the Council for Community and Economic Research database, ensuring an "apples to apples" comparison.

Along with market data collected from 10-20 peer organizations, AutoSolve will utilize data from the Economic Research Institute (ERI) private sector salary databases. This database provides access to private sector and public sector pay ranges for over 46,000 classifications across 10,000 plus locations globally. This database allows us to compare your organization's classifications and pay ranges against identical classifications and pay ranges found in the private sector and public sector to ensure accuracy of solicited market data.

Tasks

- Meet with the organization's project team to identify and reach a consensus on a list of relevant peer organizations to be used in the external salary survey. (10-15 peer organizations similar in size)
- Meet with the organization's project team to strategically create a list of positions to survey with appropriate descriptions for peer organizations to provide the correct comparative salary ranges.
- Conduct external salary survey by collecting agreed upon peers' salary range data on strategically selected positions.
- Aggregate and analyze external market survey findings to assess the organization's current compensation system competitiveness within its peer market.
- Utilize The Council of Community and Economic Research's database to adjust for cost of living.
- Utilize private sector salary data from the Economic Research Institute (ERI).
- Present market data aggregate findings to the organization's project team.

Deliverable: Report summary of market survey findings, comparing the organization's current salary ranges to the surveyed market peers, and highlighting the relative market competitiveness of each surveyed classifications' minimum, midpoint, and maximum salary range point.

Benefits Survey - External Competition

Data Collection – Market Research Benefits
We will conduct an external custom benefits survey based on the agreed upon peer group collecting health insurance, retirement, paid time off and other supplemental benefits data. The benefit survey will provide us with an understanding of the external competitive markets for fringe benefit offerings.

Tasks

- Utilize the same relevant peers from the salary survey.
- Conduct external benefits survey by collecting agreed upon market peers' benefit data.

Deliverable: Report summarizing benefits survey findings.

Classification Framework

Job Classification Categorization
We utilize data from the position description questionnaire (PDQ), and external salary survey to create a corrected classification hierarchy based on updated classification data. AutoSolve's point factor job evaluation methodology provides a means to establish the classification / job title hierarchy. The classification hierarchy list is utilized in creating the proposed pay plan aligning pay with hierarchy eliminating pay compression.

Tasks

- Analyze findings and recommendations classification review and the compensation reviews.
- Provide recommendations to update classification placement, addition and deletion.
- Meet with organization's project team to present initial classification grading to receive feedback and make revisions.

Deliverable: Report containing a list of all classifications and agreed upon grade / placement within the organization.

Employee Pay Plan Management System

External Market Analysis – Pay Structures – Implementation Analysis
Based on findings and observations from the study and the organization's pay plan philosophy, AutoSolve will propose a compensation and classification system that meets the organization's goals and needs. We will ensure the pay plan aligns with current industry best practices and your budget constraints. AutoSolve will recommend and discuss multiple pay plan options to determine the most effective range within the organization's operating market. AutoSolve will recommend and discuss multiple implementation options to determine salary increases for the organization's current employees. The system will ensure usability of the recommended pay plan system for the next two years.

Tasks

- Analyze salary survey data to develop externally competitive salary range and step-plan recommendations for each job classification.
- Provide recommendations for multiple salary structures to accommodate specialized labor markets.
- Prepare a recommended pay plan and salary range assignment separating employees by department and job function.
- Develop recommended strategies for setting hiring rates for new and promoted employees.
- Provide seven or more implementation cost options for the new recommended pay plan system.
- Meet with the organization's project team to present initial system and receive feedback on revising the newly recommended pay scales.
- Review all implementation options and select the option or options that best fit the needs of the organization.
- Provide a custom employee pay plan software management system. The employee pay plan management system will be a workable excel file that incorporates the organizations selected implementation option and the multiple recommended pay plans. The new system outlines the estimated cost to move all employees based upon the chosen implementation option, and the client's ability to add new hires and/or move employees up/down in their pay plan.

Deliverable: New pay plan management system.

Final Report, Summary Report, Software System, System Training, Present Findings

Study Deliverables
We will prepare a final report to include all aspects of the classification and compensation study. This report will be accompanied by a summary report that pulls key highlights, findings, and the results from the study. We will also provide a propriety custom employee pay plan software management system. This system represents the proposed compensation and classification system derived from the conducted study. The pay plan management system outlines the estimated cost to move all employees into the proposed compensation system based upon the chosen implementation option and pay plan competitiveness. The management system allows the organization to add and remove employees, adjust classification assigned grades and to estimate employee increases after the implementation is complete. The system is designed for continual pay plan management.

Tasks

- Prepare a final report illustrating project findings and recommendations.
- Prepare summary report consisting of key findings and recommendations.
- Provide a custom employee pay plan software management system.
- Prepare an in-depth manual and training materials for maintenance of the recommended classification and compensation pay plan management system.
- Present findings and recommendations at a public meeting of the organization's stakeholders at an agreed upon date either in person or virtually.

Deliverable: Final report, Summary Report, Pay Plan Management System, Maintenance/Training materials.

Compensation System Post Study Support

Ongoing Classification and Job Description Support
AutoSolve is committed to providing the highest-quality product and service. At the completion of each study, we provide a complimentary six (6) months of consultation and support. We also offer paid support packages.

Year One (1) – Support Package / Optional Maintenance

- **First six months support offered at no charge.**
- **Optional second six months prepaid support.**
- New classifications and placing them in the proper grade relative to the operating market and internal hierarchy.
- Re-grading current classifications on an as needed basis.
- Writing job or updating job descriptions on an as needed basis.
- Ad hoc labor market research in client's operating market on a as needed basis.

Year Two (2) – Support Package / Optional Maintenance

- New classifications and placing them in the proper grade relative to the operating market and internal hierarchy.
- Re-grading current classifications on an as needed basis.
- Writing job or updating job descriptions on an as needed basis.
- Ad hoc labor market research in client's operating market on a as needed basis.
- Market survey to analyze how the new salary ranges fall competitively within the client's operating market after one year of implementation.

Study Availability and Timeline

Firm Availability

AutoSolve maintains the following hours of operation:

- Monday through Friday: 8:00 a.m. to 5:00 p.m. Eastern Daylight Time.
- Our assigned personnel will be available throughout the term of the contract.
- Workplace location is virtual.
- Communications will be conducted through virtual meetings, phone calls, and email.
- AutoSolve will support Central Daylight Time standard business hours.

Assumptions

- Client will provide requested data in a timely manner.
- Client employees will perform internal survey and PDQ in a timely manner.
- Peers will provide requested market data in a timely manner.

Timeline

Timeline estimated at 14 working weeks for each study.

- Study timeline
  City of Independence, IA 1/19/2026 to 4/24/2026
- Our timeline is flexible and will adjust deliverable dates, taking into consideration national holidays and vacation schedules.
- AutoSolve is prepared to start the compensation study within 2 weeks after official notice of award.

City of Independence, IA 1/19/2026 to 4/24/2026

Timeline & Milestones	January				February				March				April			
Study Initiation Kick Off																
Project Management (14 weeks)																
Current Pay Plan Evaluation (3 weeks)																
Classification Evaluation (8 weeks)																
Compensation Evaluation (8 weeks)																
Classification Framework / Compensation Management System with Implementation Options (3 weeks)																
Final Report, System Training (3 weeks)																
Complimentary Support - (6 months)																

Green - Kick Off
Purple - Working Weeks
Black - Holiday Week

References

REF 1: City of Americus, Georgia – Classification and Compensation Study
Contact: Ola Terrell-Jordan, Human Resources Director
Email: oterrell-jordan@americusga.gov Phone: (229) 924-4411 ext. 248
Services Provided: 2024 – Council Approved / Implementation Completed

- Completed a comprehensive classification and compensation study for the City of Americus, Georgia, consisting of 153 employees and 77 classifications.

REF 2: City of New Prague, Minnesota- Classification and Compensation Study
Contact: Robin Pikal, Finance Director
Email: rpikal@ci.new-prague.mn.us Phone: (952) 758-4401
Services Provided: 2025 – Council Pending / Implementation Pending – January 2026

- Completed comprehensive classification and compensation study for City of New Prague, Minnesota, consisting of 57 employees and 38 classifications.

REF 3: Town of Rolesville, North Carolina – Classification and Compensation Study
Contact: Lisa Alston, Human Resources Director
Email: lisa.alston@rockymountnc.gov Phone: (252) 972-1190
Services Provided: 2024 – Council Approved / Implementation Completed

- Completed a comprehensive classification and compensation study for Town of Rolesville, North Carolina, consisting of 120 employees and 44 classifications.

REF 4: Athens-Clarke County, Georgia – Fire Department Classification and Compensation Study
Contact: Sara Ivy, Assistant Human Resources Director
Email: sara.ivy@accgov.com Phone: (706) 400-6368
Services Provided: 2025 – Council Pending / Implementation Pending – January 2026

- Completed a fire department comprehensive classification and compensation study for Athens-Clarke County, Georgia, consisting of 174 employees and 9 classifications.

REF 5: Brunswick County, Viginia – Classification and Compensation Study
Contact: Jennifer Carter, Finance Director
Email: jcarter@brunswickco.com Phone: (434) 848-3107
Services Provided: 2025 – Council Pending / Implementation Pending – January 2026

- Completed comprehensive classification and compensation study for Brunswick County, Virginia, consisting of 229 employees and 80 classifications.

REF 6: City of Rincon, Georgia – Classification and Compensation Study
Contact: Tiffany Herbert, Human Resources
Email: therbert@rinconga.gov Phone: (912) 826-5745 ext. 102
Services Provided: 2024 - Council Approved / Implementation Completed

- Completed a comprehensive classification and compensation study for the City of Rincon, Georgia, consisting of 117 employees and 53 classifications.

Exhibit A – City of Independence – Proposal Submittal Form

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	AutoSolve, Inc
Mailing Address:	46 Thatcham Drive, Saint Augustine, FL 32092
Website:	https://autosolveinc.com/
Year Firm Established:	1993
Office Location Performing the Work:	46 Thatcham Drive, Saint Augustine, FL 32092
Primary Contact Person:	Jeff Turner
Title:	President
Phone:	321-945-8762
Email:	jeff@autosolveinc.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [ ] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [ ] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

Exhibit B – City of Independence – Reference Sheet

Reference 1:

Client Name:	City of Americus, Georgia
Contact Person & Title:	Ola Terrell-Jordan, Human Resources Director
Phone:	(229) 924-4411 ext. 248
Email:	oterrell-jordan@americusga.gov
Brief Description of Project:	Completed a comprehensive classification and compensation study consisting of 153 employees and 77 classifications.

Reference 2:

Client Name:	City of New Prague, Minnesota
Contact Person & Title:	Robin Pikal, Finance Director
Phone:	(952) 758-4401
Email:	rpikal@ci.new-prague.mn.us
Brief Description of Project:	Completed comprehensive classification and compensation study consisting of 57 employees and 38 classifications.

Reference 3:

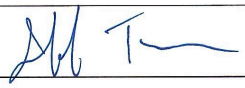
Client Name:	Town of Rolesville, North Carolina
Contact Person & Title:	Lisa Alston, Human Resources Director
Phone:	(252) 972-1190
Email:	lisa.alston@rockymountnc.gov
Brief Description of Project:	Completed a comprehensive classification and compensation study consisting of 120 employees and 44 classifications.

Exhibit C – City of Independence – Acknowledgement of Addendum and RFP Terms

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDYList Addenda Numbers received:
   Municipal Salary Study RFP - Addendum 1
   Municipal Salary Study RFP - Addendum 2
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	
Printed Name:	Jeff Turner
Title:	President
Date:	11/18/2025

bakertilly

November 20, 2025

City of Independence, IA

Technical Proposal to provide classification and compensation study

To conquer a challenging landscape, you have to understand it. Explore classification and compensation solutions that check all the boxes on the path to addressing the needs of your community.

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Baker-Tilly was very professional and responsive. They regularly contacted City staff to gather information and discuss strategy. We held several meetings involving the City's Administration, where they were very thorough in their presentations and provided very helpful information.

Assistant Director, Human Resources | Baker Tilly client

bakertilly

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As of June 3, 2025, Baker Tilly and Moss Adams have merged. Combined statistics are based on data currently available. Actual counts may vary slightly and will be finalized during the integration process.

Part A: Transmittal Letter

November 20, 2025

Matthew R. Schmitz
City Manager
City of Independence
331 1st Street E
Independence, IA 50644

30 E Seventh St
Suite 3025
St. Paul, MN 55101
United States of America

T: +1 (972) 748 0300 F:
+1 (214) 452 1164

bakertilly.com

Dear Matthew R. Schmitz:

The City of Independence (the City) seeks customized classification and compensation solutions. This proposal is the starting point — our vision of how we can protect and enhance your organizational impact as we achieve your immediate goals.

Our approach is rooted in collaboration, data-driven analysis, and proven methodologies, including our proprietary *Systematic Analysis and Factor Evaluation (*SAFE®) job evaluation system. With extensive experience serving Midwest municipalities and a dedicated team of public sector compensation specialists, we aim to help the City attract and retain top talent while enhancing organizational impact for years to come.

We understand the importance of ensuring internal pay equity, enhancing market competitiveness and aligning compensation structures with the City's evolving operational needs. Our passionate and dedicated state and local government classification and compensation professionals are committed to delivering fair, defensible and actionable results.

We affirm that:

- This proposal is valid for a minimum of 90 days from the submission deadline.
- Jada Kent, the individual signing this letter, is authorized to bind Baker Tilly contractually.

This is more than a proposal. It's a promise to deliver a comprehensive classification and compensation study tailored to your unique needs. Our methodology combines stakeholder engagement, rigorous internal equity and market analysis, and strategic pay structure design to help the City address pay compression and ensure long-term sustainability.

With a proven track record of success in the Midwest and across the country, our team of professionals brings the tools, experience and commitment necessary to deliver a future-ready compensation system.

The road map shared in our proposal demonstrates the importance of the City to us as a client. We can't wait to get started.

Very truly yours,

Jada Kent

Jada Kent, CCP, CLRP, Managing Director | Practice Leader
+1 (940) 368 3033 | jada.kent@bakertilly.com

Part B: Firm experience and qualifications

Guiding you with our resources, reputation and reach

Making decisions today to shape tomorrow is especially challenging in these extraordinary times. The City requires a firm with classification and compensation professionals who combine functional experience, industry knowledge and technical expertise to respond to your needs and support you as your City evolves.

Baker Tilly Advisory Group, LP is jointly owned by Baker Tilly principals and private equity firms Hellman & Friedman and Valeas Capital Partners. Baker Tilly was formed in 1931. We have over 11,000+ team members and more than 1,000+ principals.

548 projects since 2009

8 compensation certifications

35+ years of experience

$3B firm revenue in FY2025

100+ worldwide locations

300+ workplace and culture awards

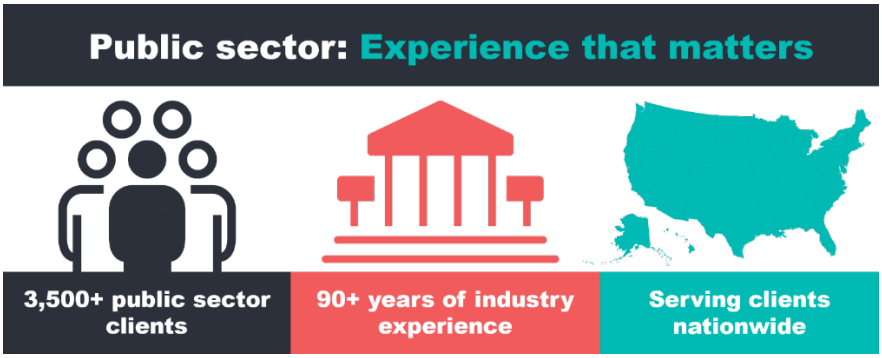
GIVING YOU THE TOOLS YOU NEED TO NAVIGATE THE FUTURE

Baker Tilly will successfully guide the City through changing landscapes with skills, stability and strength as one of the oldest and largest advisory, tax and assurance firms in the United States.

Delivering specialized expertise to our public sector clients

State and local government is a complex, unique environment shaped by fiscal, regulatory and operational considerations not found in other sectors. Recognizing this complexity and eager to serve as a true valued advisor to the public sector, **nearly 350 Baker Tilly professionals — including more than 30 principals** — focus directly on serving governments and provide hundreds of thousands of client service hours annually to organizations like the City. We will be providing our services from our Saint Paul, MN office.

Nationwide, our public sector practice serves more than 3,500 state and local governmental entities, including municipalities, counties, school districts, utilities, transit organizations, airports and special authorities. Several of these client groups are now served by dedicated specialists in distinct sub-practices.



Sharing our similar client experience

Your proposed engagement team has conducted hundreds of similar studies nationwide for more than 35 years, resulting in successful implementations in governments of all sizes.

We focus our knowledge, skills and expertise on the public sector and have collaborated with organizations all over the country to provide compensation-related services.

548 projects completed

Our engagement team has conducted 548 successful compensation projects since 2009.

- **Our SAFE job evaluation system is a fair, consistent, defensible and objective methodology for comparing position characteristics.** In today's environment, organizations need to know that their methods are proven and sound. SAFE provides a proven methodology that evaluates the value of your positions using nine key factors.
- **With Baker Tilly, you do not just get a study; you get a customized system.** When we conduct a study for our clients, we train them to utilize and maintain the results. When we leave, you will have a completed study **and** a classification system to support you as you grow and move forward into the future. As positions evolve, new positions are created and market conditions change, your HR staff will be able to make the appropriate adjustments using the SAFE job evaluation system.
- **We know that a good study rests on quality data.** Our recommendations are data-driven, and our process adheres to best practices and guidelines for collecting and analyzing that data. When working with public sector organizations, we understand that the results we submit to you may become public records. This means our reputation stands on the quality of those results and the validity of our recommendations. This is why we have quality assurance protocols in place to safeguard the quality of our data.
- **We will assign Certified Compensation Professionals to analyze your market data and build your new pay structures.** Our team understands that compensation analysis is both an art and a science. We have a strong cadre of trained and experienced professionals working together to ensure that appropriate and competitive pay structures are presented for consideration.

Listing our similar projects

The following is a sample of organizations for whom Baker Tilly has provided classification and compensation services over the last few years. We realize the list is lengthy, but so is our experience working with organizations that are very similar to and very different from yours. We hope you will trust that our extensive experience means we've seen and solved our share of challenges and can assist you and your organization through this study and any challenges you may also be facing.

SAMPLE OF RELEVANT PROJECTS: PRESENT — 2022
Projects in Midwest highlighted / in Iowa noted in red.

Year	Client	State	Project	Pop.
Current	Alamance County	NC	Class & comp study, Part 2	173,877
Current	Allegheny County	PA	Class & comp study	1,225,000
Current	Auburn	IN	Class & comp study	13,989
Current	Bemidji	MN	Class & comp study	15,743
Current	Bloomington	MN	Class & comp study	87,797
Current	Cape Coral	FL	Class & comp study	224,455
Current	Crystal	MN	Class & comp study	21,906
Current	Deputy Sheriffs Assoc.of Bexar County	TX	Market study	
Current	Guilford County	NC	Compensation consulting	549,866
Current	Johnson County	IA	Class & comp study	160,080
Current	Laguna Beach	CA	Class & comp study	23,032
Current	Madison	WI	Class & comp study	269,196
Current	Merrillville	IN	Class & comp study	36,347
Current	New Bern	NC	Compensation consulting	32,226
Current	Natrona County	WY	Class & comp study	80,410
Current	New Carlisle	IN	Class & comp study	1,910
Current	Ottawa County	MI	Class & comp study	306,235
Current	Pasco County Sheriff's Office	FL	Class & comp study	632,996
Current	Sachse	TX	Ongoing comp assistance	32,294
Current	Sauk Rapids	MN	Class & comp study	13,832
Current	State of Utah	UT	Compensation study	3,417,734
Current	Trinity River Authority	TX	Ongoing comp assistance	
Current	Wake Forest	NC	Class & comp study	49,657
Current	Weber County	UT	Class & comp study	269,561
Current	West Lafayette	IN	Class & comp study	45,060
2025	Beltrami County	MN	Class & comp study	46,799
2025	Hillsborough County Aviation Authority	FL	Class & comp study	
2025	Hollister	CA	Compensation study	44,218
2025	Kansas City Police Department	MO	Class & comp study	508,394

PART B: FIRM EXPERIENCE AND QUALIFICATIONS

SAMPLE OF RELEVANT PROJECTS: PRESENT — 2022 Projects in Midwest highlighted / in Iowa noted in red.				
Year	**Client**	**State**	**Project**	**Pop.**
2025	Kennewick	WA	Class & comp study	84,750
2025	King County Housing Authority	WA	Class & comp study	
2025	Lake County	IL	Class & comp study	711,239
2025	LeSueur County	MN	Compensation study	29,255
2025	Maricopa County Sheriff's Office	AZ	Compensation study	4,615,909
2025	Medina County	TX	Class & comp study	53,723
2025	Mount Holly	NC	Class & comp study	18,170
2025	Pasco	WA	Class & comp study	78,871
2025	Paso Robles	CA	Class & comp study	31,759
2025	Pineville	NC	Class & comp study	10,866
2025	Roseville	CA	Career Ladder Development	159,135
2025	Sachse	TX	Class & comp study	32,294
2025	Savannah	GA	Class & comp study	148,566
2025	Sioux City	IA	Class & comp study	85,543
2025	St. Paul	MN	Class & comp study	303,176
2025	Ulster County	NY	Class & comp study	181,951
2025	Vernon	CA	Class & comp study	35,162
2025	Weld County	CO	Class & comp study	340,036
2024	Alamance County	NC	Class & comp study	173,877
2024	Apex	NC	Class & comp update	62,911
2024	Burke County	NC	Class & comp study	87,611
2024	Columbus	OH	Compensation study	906,528
2024	Douglas County	NV	Class & comp study	49,870
2024	Franklin County	NC	Class & comp study	68,570
2024	Frederick	MD	Class & comp study	79,588
2024	Greensboro	NC	Pay equity study	298,236
2024	Miami	FL	Compensation study	305,756
2024	Milwaukee Metro Sewer District	WI	Class & comp study	
2024	Mono County	CA	Class & comp study	13,247
2024	Morehead City	NC	Class & comp study	9,857
2024	North Las Vegas	NV	Class & comp study	247,248
2024	Pinellas County Sheriff's Department	FL	Class & comp study	959,107
2024	Richfield	MN	Class & comp study	36,527
2024	Saginaw	TX	Class & comp study	24,011
2024	Seattle Housing Authority	WA	Class & comp study	

PART B: FIRM EXPERIENCE AND QUALIFICATIONS

SAMPLE OF RELEVANT PROJECTS: PRESENT — 2022
Projects in Midwest highlighted / in Iowa noted in red.

Year	Client	State	Project	Pop.
2024	Summit County	CO	Class & comp study	31,055
2024	Trinity River Authority	TX	Class & comp study	
2024	Wake Forest, part 1	NC	Compensation study	49,657
2023	Ashland	KY	Pay & class study	21,625
2023	Bemidji	MN	Market study	14,574
2023	Bexar County	TX	Comp & perf management study	1,990,000
2023	Clark County	WA	Class & comp study	511,404
2023	Eudora	KS	Pay & class study	6,408
2023	Fort Wayne	IN	Class & comp study	263,886
2023	Frederick Police Department	MD	Class & comp study	79,588
2023	Goshen	IN	Wage & benefits analysis	34,108
2023	Greene County	VA	Class & comp study	19,779
2023	Guadalupe County	TX	Class & comp study	177,036
2023	Harrisonburg	VA	Class & comp study	51,814
2023	Hernando County	FL	Classification study	200,638
2023	Laurinburg	NC	Class & comp study	15,118
2023	Marion	IA	Class & comp study	41,535
2023	Minnehaha Creek Watershed District	MN	Class & comp study	
2023	Montgomery County	TX	Compensation study	607,391
2023	New Brighton	MN	Class & comp study	23,454
2023	Prince Edward County	VA	Comp consulting services	22,950
2023	Purcellville	VA	Class & comp study	8,929
2023	Rappahannock County	VA	Class & comp study	7,407
2023	Rockingham County	VA	Class & comp study	81,244
2023	RSW Regional Jail	VA	Class & comp study	
2023	Sampson County	NC	Class & comp study	58,990
2023	Scott County	VA	Class & comp study	21,534
2023	St. Cloud HRA	MN	Class & comp study	
2023	Stevens Point	WI	Class & comp study	25,670
2023	Victoria County	TX	Class & comp study	92,035
2023	Waite Park	MN	Market study	8,360
2023	Wayzata	MN	Market study	4,378
2023	Wheaton	IL	Classification study	53,970
2023	Woodstock	VA	Class & comp study	5,861
2022	Abilene	TX	Class & comp study	124,156

PART B: FIRM EXPERIENCE AND QUALIFICATIONS

SAMPLE OF RELEVANT PROJECTS: PRESENT — 2022 Projects in Midwest highlighted / in Iowa noted in red.				
Year	**Client**	**State**	**Project**	**Pop.**
2022	Apex	NC	Class, comp & org study	51,370
2022	Appleton	WI	Class & comp study	75,644
2022	Beeville	TX	Comp & benefits study	12,863
2022	Bellingham	WA	E-Team class & comp study	89,045
2022	Bluffton	IN	Comp & class study	9,919
2022	Chesapeake Bay Bridge Tunnel	VA	Class & comp update	
2022	Chisago County	MN	Class & comp study	53,916
2022	Cibolo	TX	Class & comp study	28,920
2022	Colleyville	TX	Pay & class	26,945
2022	Corpus Christi MPO	TX	Market study	
2022	Cumberland County	VA	Pay & class study	9,681
2022	Duplin County	NC	Compensation study	58,967
2022	Eastern Shore of Virginia E911	VA	Market study	
2022	Essex County Public Schools	VA	Class & comp study	
2022	Evanston	IL	Pay & class study	78,110
2022	Evansville	WI	Compensation study	5,378
2022	Fluvanna County	VA	Class & comp study	27,270
2022	Greenbelt	MD	Class & comp study	24,921
2022	Horicon	WI	Class & comp study	3,595
2022	Horizon Public Health	MN	Class & comp study	
2022	Illinois Toll Hwy Authority	IL	Class & comp study	
2022	Isanti County	MN	Class & comp study	40,596
2022	Jackson	WY	Class & comp study	10,760
2022	Janesville	WI	Pay & class study	65,616
2022	Lake Elmo	MN	Class & comp study	12,899
2022	Lake Forest	IL	Compensation study	19,367
2022	Maplewood	MN	Class & comp study	40,545
2022	Marble Falls	TX	Pay & class study	6,932
2022	Monroe	NC	Comp & class study	35,105
2022	Olive Township	IN	Compensation study	5,248
2022	Oswego	IL	Compensation study	34,585
2022	Pleasant Prairie	WI	Market study	21,250
2022	Pope County	MN	Pay plan update	11,048
2022	Pueblo Board of Water Works	CO	Market study	
2022	Racine	WI	Benefits & comp study	77,081

PART B: FIRM EXPERIENCE AND QUALIFICATIONS

SAMPLE OF RELEVANT PROJECTS: PRESENT — 2022 Projects in Midwest highlighted / in Iowa noted in red.				
Year	**Client**	**State**	**Project**	**Pop.**
2022	Rosemount	MN	Class & comp study	24,292
2022	Roswell	NM	Pay & class study	47,941
2022	Sherburne County	MN	Compensation study	97,238
2022	Vigo County	IN	Class & comp study	107,038
2022	Virgin Islands Water & Power Authority	USVI	Class, comp & org study	
2022	Virginia Railway Express	VA	Class & comp study	
2022	Wayzata	MN	Class & comp study	4,434
2022	West Point	VA	Comp & class study	3,419
2022	Williamson Co. & Cities Health District	TX	Class & comp study	
2019	Iowa League of Cities, Des Moines	IA	Compensation study	3,146,000
2019	Pottawattamie County	IA	Class & comp study	93,386
2019	Council Bluffs	IA	Class & comp study	62,316
2018	Johnson County	IA	Comp & class study	144,251
2017	Story County	IA	Class & comp study	92,406
2017	Pleasant Hill	IA	Class & comp study	9,082
2016	Ankeny	IA	Class & comp study	51,567
2011	Story County	IA	Class & comp study	91,140

Aligning key engagement team members with your goals

We believe in strong personal relationships, which means a personal interest in the City from some of our most experienced team members. Engagement team members are introduced below; complete resumes are available in **Appendix A**.

INTENTIONALLY SELECTED ENGAGEMENT TEAM FOR INDEPENDENCE

Jada Kent, CCP, CLRP — Managing Director

17 Cowboys Way, Suite 800, Frisco, TX 75034
+1 (972) 748 0514 | jada.kent@bakertilly.com

Jada leads the compensation consulting practice within Baker Tilly's public sector advisory group and has been with the firm since 2015. She has more than 10 years of experience providing consulting services to local governments nationwide. Jada is focused on providing a variety of services related to job classification, base pay market analysis, pay plan development, FLSA review, benefits comparative analysis, pay policy recommendations and compensation philosophy design, as well as strategic compensation communication and change management. She has earned a Master of Legal Studies from Texas A&M School of Law, a Master of Public Affairs from the University of Texas at Dallas, is a member of the North Texas Compensation Association, a Certified Compensation Professional, and a Certified Labor Relations Professional

Candi Harris — Manager

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Candi is a manager with experience engaging diverse stakeholder groups, managing a variety of programs, and developing effective learning and development solutions, drawing on nearly 20 years of experience across the higher education and local government sectors. She successfully led the development of several high-impact programs at the University of North Texas. Before joining Baker Tilly, she led the planning and development efforts for policy administration and organizational development for the City of Denton, Texas. Candi aims to support leaders as they build healthy, more effective organizations while making life better for their most valuable resource – people. Candi is an Association for Talent Development Master Trainer, holds a Leadership Professional in Ethics and Compliance designation, and earned a Master of Public Administration from Sam Houston State University.

Thomas Patton, CCA — Senior Consultant

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Thomas is a senior consultant with a background in human resources management and development, possessing more than five years of experience in providing classification and compensation services to local government organizations. Thomas serves as a project lead for numerous engagements, manages all ongoing consulting service contracts, and acts as our resident job evaluation specialist, providing training to staff and clients on using our point-factor tool. He is further experienced in reviewing FLSA and developing job descriptions and career ladders. Thomas earned a Bachelor of Science in human resources development from the University of Minnesota-Twin Cities and is a Certified Compensation Analyst.

Part C: Project approach and work plan

Our process is highly collaborative and requires the participation of our clients. We want to leave the City of Independence with a classification and compensation plan that will assist in achieving your compensation philosophy, attract and retain qualified workers and align with your organizational needs.

The following pages outline our methodology and proposed project scope for the City's classification and compensation study. Our team of Certified Compensation Professionals developed Baker Tilly's approach and project tools. We take pride in our ability to provide your organization with sound results and recommendations that, if implemented, are fair and defensible.

Phase 1 – Project Initiation

Planning meeting and data collection

Baker Tilly will begin by meeting with the City's project team to establish working relationships, finalize a work plan and help ascertain major issues your organization seeks to address in your compensation study. Next, Baker Tilly will collect documentation from the City, such as job descriptions, organization charts, pay plans, policy handbook, an employee census file, etc. We recommend conducting one-on-one meetings with your department heads to gather direct feedback from your leadership team about any issues or special circumstances they may face in their areas, particularly regarding titles and classifications.

Employee communication and PAQ collection

Next, Baker Tilly will conduct leadership and employee communication meetings to introduce our team and the project process, answer questions about the process and review the PAQ that employees will be asked to complete. The PAQ provides an opportunity for each employee to provide input, in their own words, about the work completed in their position. The information collected from the PAQs serves as the foundation for the remainder of the study. For that reason, a supervisor review is included in the process. Baker Tilly may also conduct individual or group interviews with employees if necessary. **All collected PAQs will be provided back to the City.*

Phase 2 – Classification assessment

Title review

A review of job titles is critical to ensure that they accurately reflect the work being performed and remain consistent across the organization. Over time, titles can become outdated, inconsistent or inflated, leading to confusion for employees. Misaligned titles can also impact employee morale by obscuring the true nature or level of their responsibilities.

By reviewing and standardizing titles — particularly within exempt, management and general employee groups — the City can improve clarity, better align roles within job families, and support the development of career ladders. Even small changes, such as standardizing formatting or abbreviations, can significantly enhance recruitment efforts and improve employees' understanding of their place within the organization. This type of review helps establish consistency in nomenclature and strengthens the overall administration of the classification system.

Job evaluation

Job evaluation involves assessing and comparing positions within an organization to determine their relative value. Baker Tilly utilizes a proprietary point-factor job evaluation system called SAFE® (Systematic Analysis and Factor Evaluation), designed specifically for public sector roles. This method assigns point values across multiple levels for each compensable factor, resulting in a total score that reflects the internal equity of each position. The SAFE system supports the development of a fair and consistent job hierarchy, aligning with the requirements of the federal Equal Pay Act.

NINE COMPENSABLE FACTORS MEASURED BY SAFE		
Compensable factor	**Weight**	**Descriptions/measurement**
1. Education	**16%**	Minimum formal education level required by the position
2. Experience	**12%**	Minimum years of experience required by the position
3. Level of work	**14%**	Degree of difficulty of work performed by the position
4. Human relations	**8%**	Type and level of human interactions
5. Physical demands	**5%**	Physical exertion performed by the position
6. Working conditions	**7%**	Environmental conditions experienced by the positions
7. Independence to act	**12%**	Degree of independence to make decisions and act on them
8. Impact of actions	**14%**	Severity of consequences as a result of decisions
9. Supervision exercised	**14%**	Type and level of supervision exercised
	100%	**TOTAL**

Baker Tilly can conduct job evaluations using employee-submitted PAQs and existing job descriptions. Results will be reviewed and finalized with the City's project team to establish a relative worth hierarchy.

FLSA analysis (priced separately)

Baker Tilly will assess the Fair Labor Standards Act (FLSA) designation for each position to support the City in determining appropriate exempt or nonexempt status. This evaluation will draw on both existing position documentation and new information collected through Position Analysis Questionnaires (PAQs) to ensure a comprehensive understanding of job duties. If any recommendations differ from current FLSA classifications, we will provide a clear rationale aligned with the Department of Labor's exemption criteria.

Please note that our FLSA recommendations reflect a nonlegal interpretation of Department of Labor guidelines. We advise clients to seek independent legal counsel to validate FLSA determinations.

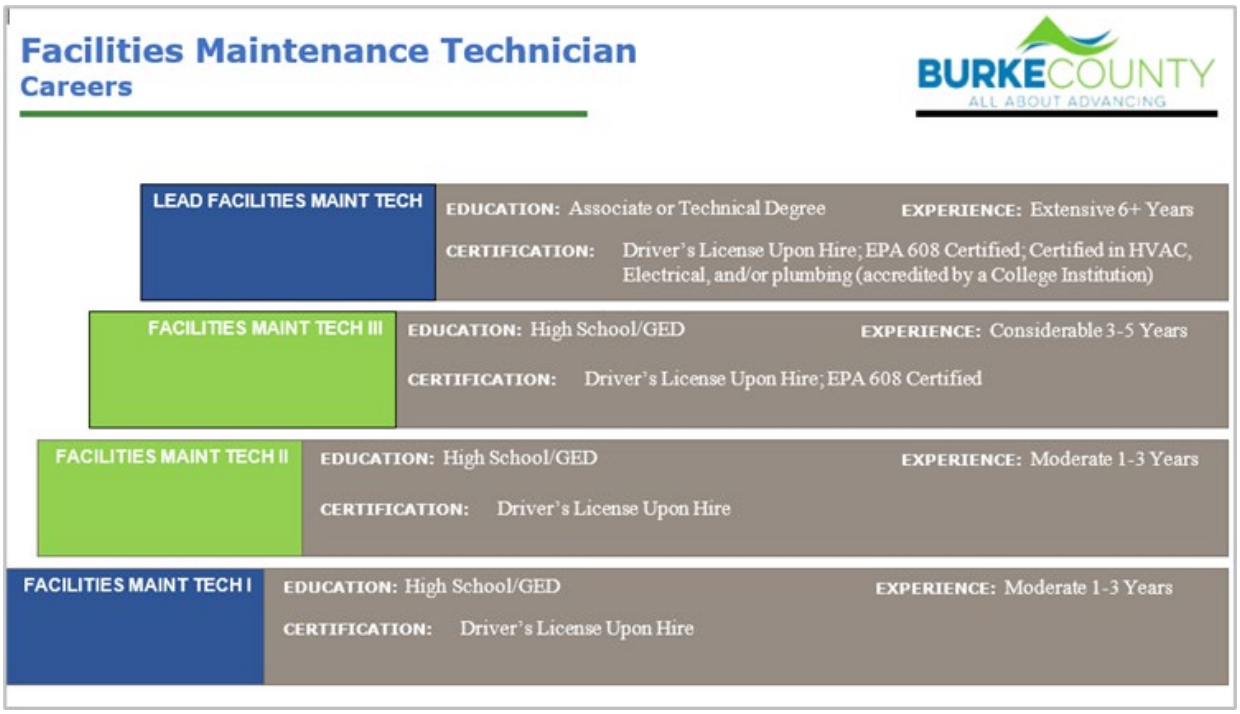
Job descriptions (priced separately)

Baker Tilly will collaborate with the City to update job descriptions to uniformly reflect the distinguishing characteristics, essential functions, minimum qualifications, working conditions, supervision exercised and received, and certification/licenses/registrations/driving requirements for classification as-needed. These updates will also include any adjustments to titles, FLSA designations and ADA-related information as established by the project.

Career ladders (priced separately)

Baker Tilly will consider job progressions that exist within the City and that may need to be developed during the title and job evaluation reviews. In addition, we can develop career ladder documentation for each identified series to help the City demonstrate upward mobility within different job families across each department. This includes meetings with the City's project team and/or department heads to identify existing career progress and develop new ones, as-needed.

Sample career ladder deliverable



Phase 3 – Compensation benchmarking

Base pay survey and analysis

Peer organizations: Baker Tilly will work with the City to establish a list of comparable peer organizations to include in the study. Generally, these organizations will be similar in size and the services they provide, and they will have similar job roles. These organizations are often those from which you lose employees or gain new ones; however, it may be necessary to consider public peer organizations similar in size and services, but located outside the immediate geographic area. Early in the process, we like to collect feedback from department heads about the organizations they recommend for inclusion. This list often serves as our starting point for establishing an approved list of peers with which to move forward.

Private sector companies rarely respond to market survey requests. Therefore, to represent the private sector in the dataset, we utilize pay data from the following survey sources: CompAnalyst, Economic Research Institute (ERI), and the Bureau of Labor Statistics.

Data analysis: In distributing the custom market study, Baker Tilly will request base pay ranges for analogous positions. The survey will include a minimum qualification and a summary of work performed by each position to assist peers in matching their positions. Baker Tilly will review and validate survey responses to confirm a 75% overlap in duties and responsibilities, as this is the best practice definition of a "good" match.

Adjustments may be applied to establish consistency in market comparison; those include:

- Adjustments for differences in workweek hours
- Aging the data if it's not for the current fiscal year
- Geographic cost of labor adjustments

Market reports: Baker Tilly will deliver two market reports:

1. An aggregate of the average minimum, midpoint and maximum for each benchmark.
2. A comparison of the City's full range to the full market range.

Sample market results

#	Department	Benchmark Title	Matches	Average Minimum	Average Midpoint	Average Maximum	Spread
1	Administration	City Administrator	7	115,638.95	135,998.75	149,182.14	29%
2	Administration	City Clerk	5	64,417.15	73,749.84	83,082.52	29%
3	Building Inspections	Building Official	10	71,421.18	84,443.23	97,465.28	36%
4	Communications	Director of Communications & Community Engagment	4	75,859.29	94,214.87	112,570.45	48%
5	Community Developmen	Director of Community Development	11	83,597.87	98,177.72	112,757.57	35%
6	Finance & Admin	Accountant	9	62,014.07	74,704.62	87,395.16	41%
7	Finance & Admin	Accountant Clerk	11	46,745.78	55,492.67	62,704.34	34%
8	Finance & Admin	Administrative Assistant	8	42,700.57	50,210.81	57,721.05	35%
9	Finance & Admin	Director of Finance and Administration	12	101,431.02	125,245.91	149,060.81	47%
10	Finance & Admin	Utility Billing Clerk	12	47,940.98	55,911.35	63,419.80	32%
11	Public Safety	Deputy Fire Chief	5	68,562.00	85,194.52	88,254.95	29%
12	Public Safety	Fire Inspector/Training Officer	3	62,918.03	72,923.67	82,462.43	31%
13	Public Safety	Chief of Police	6	95,766.90	109,930.07	124,093.23	30%
14	Public Safety	Lead Police Records Technician	5	45,229.72	54,262.68	63,295.64	40%
15	Public Safety	Police Commander	6	81,181.10	92,218.43	103,255.76	27%
16	Public Safety	Police Officer	10	61,842.82	72,068.24	82,293.67	33%
17	Public Safety	Police Records Technician	12	43,707.88	51,911.91	58,545.26	34%
18	Public Safety	Police Sergeant	9	72,902.07	86,154.45	98,016.13	34%
19	Public Safety	Property Technician Law Enforce Secretary	7	45,901.72	53,991.18	62,080.64	35%
20	Public Works	Building Maintenance Worker	10	43,847.18	51,822.67	59,798.16	36%
21	Public Works	Public Works Director	6	98,811.71	110,837.51	122,863.31	24%
22	Public Works	Utility Maintenance Worker	11	48,805.31	57,783.96	66,620.71	37%
23	Utilties	Director of Utilities & Infrastructure	5	97,574.80	115,101.46	132,628.12	36%

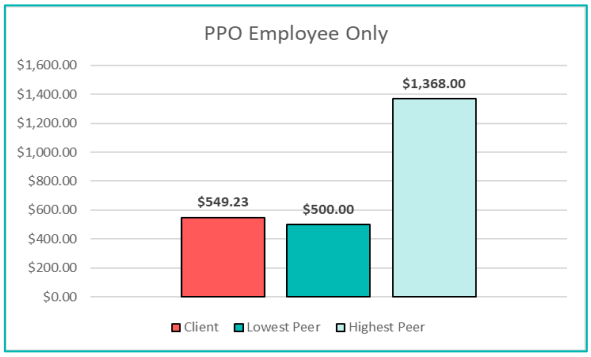
Sample range comparison

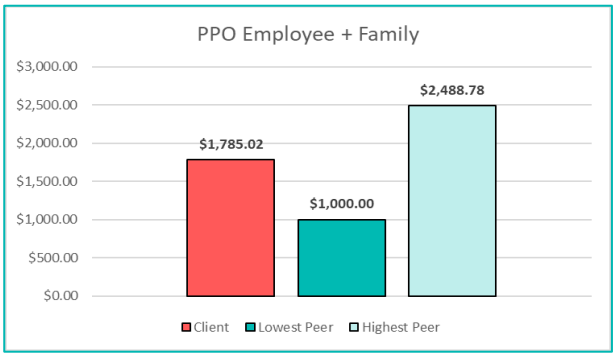
				Market			City					
#	Department	Benchmark Title	Matches	Average Minimum	Average Midpoint	Average Maximum	Current Minimum	+/- Market	Current Midpoint	+/- Market	Current Maximum	+/- Market
1	Finance & Admin	Administrative Assistant	8	42,700.57	50,210.81	57,721.05	43,368.00	1.6%	48,287.20	-3.8%	53,206.40	-7.8%
2	Finance & Admin	Accountant Clerk	11	46,745.78	55,492.67	62,704.34	47,236.80	1.1%	52,759.20	-4.9%	58,281.60	-7.1%
3	Public Safety	Police Records Technician	12	43,707.88	51,911.91	58,545.26	47,236.80	8.1%	52,759.20	1.6%	58,281.60	-0.5%
4	Finance & Admin	Utility Billing Clerk	12	47,940.98	55,911.35	63,419.80	50,440.00	5.2%	56,472.00	1.0%	62,504.00	-1.4%
5	Public Safety	Lead Police Records Technician	5	45,229.72	54,262.68	63,295.64	50,440.00	11.5%	56,472.00	4.1%	62,504.00	-1.3%
6	Public Safety	Property Technician Law Enforce Secretary	7	45,901.72	53,991.18	62,080.64	50,440.00	9.9%	56,472.00	4.6%	62,504.00	0.7%
7	Public Works	Building Maintenance Worker	10	43,847.18	51,822.67	59,798.16	54,412.80	24.1%	60,569.60	16.9%	66,726.40	11.6%
8	Public Works	Utility Maintenance Worker	11	48,805.31	57,783.96	66,620.71	54,412.80	11.5%	60,569.60	4.8%	66,726.40	0.2%
9	Administration	City Clerk	5	64,417.15	73,749.84	83,082.52	62,234.63	-3.4%	70,707.23	-4.1%	79,179.83	-4.7%
10	Public Safety	Police Officer	10	61,842.82	72,068.24	82,293.67	64,500.80	4.3%	71,895.20	-0.2%	79,289.60	-3.7%
11	Finance & Admin	Accountant	9	62,014.07	74,704.62	87,395.16	71,252.44	14.9%	80,952.72	8.4%	90,653.00	3.7%
12	Building Inspections	Building Official	10	71,421.18	84,443.23	97,465.28	76,240.11	6.7%	86,619.41	2.6%	96,998.71	-0.5%
13	Public Safety	Fire Inspector/Training Officer	3	62,918.03	72,923.67	82,462.43	76,240.11	21.2%	86,619.41	18.8%	96,998.71	17.6%
14	Public Safety	Police Sergeant	9	72,902.07	86,154.45	98,016.13	84,739.20	16.2%	87,755.20	1.9%	90,771.20	-7.4%
15	Public Safety	Police Commander	6	81,181.10	92,218.43	103,255.76	87,287.29	7.5%	99,170.55	7.5%	111,053.81	7.6%
16	Public Safety	Deputy Fire Chief	5	68,562.00	85,194.52	88,254.95	87,287.29	27.3%	99,170.55	16.4%	111,053.81	25.8%
17	Communications	Director of Communications & Community Engagment	4	75,859.29	94,214.87	112,570.45	93,397.41	23.1%	106,112.49	12.6%	118,827.58	5.6%
18	Community Development	Director of Community Development	11	83,597.87	98,177.72	112,757.57	93,397.41	11.7%	106,112.49	8.1%	118,827.58	5.4%
19	Public Works	Public Works Director	6	98,811.71	110,837.51	122,863.31	93,397.41	-5.5%	106,112.49	-4.3%	118,827.58	-3.3%
20	Utilties	Director of Utilities & Infrastructure	5	97,574.80	115,101.46	132,628.12	93,397.41	-4.3%	106,112.49	-7.8%	118,827.58	-10.4%
21	Finance & Admin	Director of Finance and Administration	12	101,431.02	125,245.91	149,060.81	106,930.68	5.4%	121,488.18	-3.0%	136,045.69	-8.7%
22	Public Safety	Chief of Police	6	95,766.90	109,930.07	124,093.23	106,930.68	11.7%	121,488.18	10.5%	136,045.69	9.6%
23	Administration	City Administrator	7	115,638.95	135,998.75	149,182.14	114,415.83	-1.1%	129,992.36	-4.4%	145,568.89	-2.4%
							Average Min	9.1%	Average Mid	3.8%	Average Max	1.2%

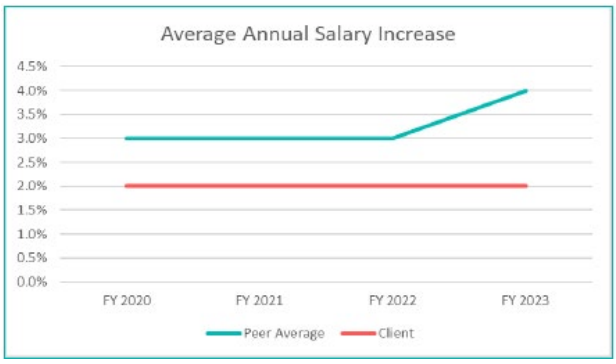
Benefits comparison

In addition to base pay, Baker Tilly's custom market survey will collect data on peer pay plans, pay policies and practices, health insurance, retirement and paid time off, and other supplemental benefits and pay differentials. The benefits results will be compiled, compared to your organization's fringe benefit offerings, and included in the final report.

Sample comparisons







Phase 4 – Pay plan development

Pay plan design

Baker Tilly will collaborate with the City's project team to discuss preferences for pay plan design and strategies for aligning positions within the selected structure. This phase provides an opportunity to either consolidate positions into a single or a limited number of pay structures or to develop distinct structures for different employee groups. To maintain a competitive price, Baker Tilly will design up to three pay structures tailored to the City's workforce. Depending on the organization's size and job diversity, multiple structures may be recommended to support the City's compensation philosophy and operational needs.

Pay plan examples

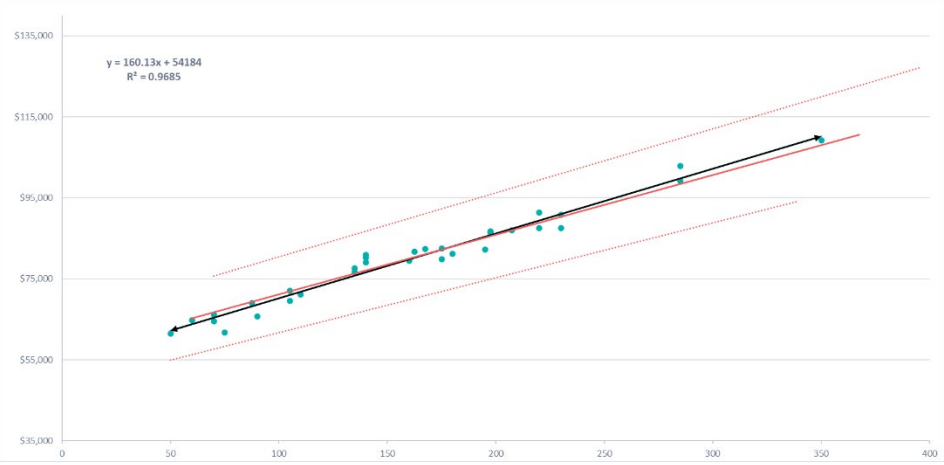
	Grade	1	2	3	4	5	6	7	Mid Diff	Spread
Step	1	$50,000	$52,500	$55,125	$57,881	$60,775	$63,814	$67,005		34%
	2	$54,000	$56,700	$59,535	$62,512	$65,637	$68,919	$72,365	8.0%	34%
	3	$58,320	$61,236	$64,298	$67,513	$70,888	$74,433	$78,154	8.0%	34%
	4	$62,986	$66,135	$69,442	$72,914	$76,559	$80,387	$84,407	8.0%	34%
	5	$68,024	$71,426	$74,997	$78,747	$82,684	$86,818	$91,159	8.0%	34%
	Grade	Minimum			Midpoint			Maximum	Mid Diff	Spread
Open	1	$50,000			$57,881			$67,005		34%
	2	$54,000			$62,512			$72,365	8.0%	34%
	3	$58,320			$67,513			$78,154	8.0%	34%
	4	$62,986			$72,914			$84,407	8.0%	34%
	5	$68,024			$78,747			$91,159	8.0%	34%
	Grade	1	2	3	4			Maximum	Mid Diff	Spread
Hybrid	1	$50,000	$52,500	$55,125	$57,881			$72,352		45%
	2	$54,000	$56,700	$59,535	$62,512			$78,140	8.0%	45%
	3	$58,320	$61,236	$64,298	$67,513			$84,391	8.0%	45%
	4	$62,986	$66,135	$69,442	$72,914			$91,142	8.0%	45%
	5	$68,024	$71,426	$74,997	$78,747			$98,434	8.0%	45%

Grade assignments

Once the pay structures are finalized, positions will be assigned to appropriate pay grades using a combination of internal job evaluation scores from the SAFE system and external market data. In some cases, state regulations may dictate which methodology must be prioritized. Regardless of the approach, Baker Tilly will apply regression analysis to evaluate the relationship between internal and external data and to identify any anomalies or outliers.

Preliminary grade assignments will be reviewed with the City's project team, and Baker Tilly may also recommend a broader review with department heads to gather additional input before finalizing the assignments.

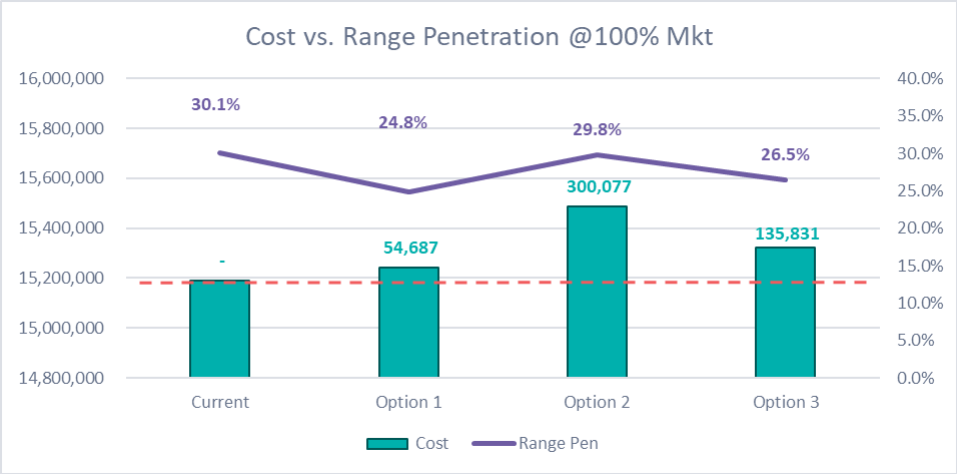
Sample regression analysis



Implementation and costing analysis

To this point, the study has focused entirely on the value of the position. During implementation, the focus will shift to understanding the cost to the organization to adopt the proposed classification and compensation plan, as well as the impact on each employee across three different scenarios. These scenarios are designed to illustrate the minimum action and cost required for implementation, as well as options for providing across-the-board adjustments and focusing on the compression and equitable placement of employees within their newly assigned pay ranges.

Sample implementation cost analysis



Pay policy recommendations (priced separately)

Changes to the City's classification and compensation system may affect current pay-related policies and practices. To support a smooth transition, Baker Tilly will work closely with the City's project team to identify any impacted areas and provide recommendations for necessary updates. Key areas for review may include:

- **Compensation philosophy.** Clarifying the City's guiding principles on how employees should be compensated and ensuring these values are reflected in formal pay policies.
- **Pay administration.** Defining how the classification and compensation system will be implemented, maintained and updated over time.
- **Pay progression.** Establishing how employees will advance within their pay ranges.
- **Pay structure adjustment.** Outlining the process and timing for future updates to the pay structure.
- **Hiring, promotion, reclassification.** Setting clear guidelines for when employees may be hired or promoted above the range minimum and determining appropriate increases for reclassifications.
- **Supplemental pay.** Reviewing policies related to additional pay for special skills, shift differentials, on-call or call-back duty and other compensation beyond base salary.

Phase 5 – Project completion

Final reporting

Baker Tilly will prepare a final report summarizing the methodology used, key findings and recommendations tailored to the City. The report will include detailed documentation of title recommendations, market survey results (including average minimums, midpoints, and maximums), proposed pay structure(s), recommended grade assignments and cost estimates for various implementation scenarios. The report will focus on position-level outcomes and will not include individual employee data.

Communication meetings and training

Our approach follows best practices as outlined by WorldatWork and the Society for Human Resource Management (SHRM), and we stand behind the study's results through implementation, including presenting findings to City leadership. Additionally, Baker Tilly may recommend presenting the results to employees, providing transparency into the process, clarifying what was and was not considered, and offering an opportunity for questions and feedback.

Finally, we will facilitate training for HR staff on using our job evaluation tool, updating pay plans and administering the classification and compensation plan going forward. This includes delivery of all project documentation.

Ongoing assistance (optional)

While the City's team will be fully trained and able to maintain its classification and compensation system, Baker Tilly frequently continues to support clients with ongoing advisory and maintenance services following the completion of a study. These post-contract services may include:

POST CONTRACT SUPPORT	
• Pay structures updates	• Compliance reviews + pay equity reporting
• Annual market review and benchmarking	• Policy development and refinement
• FLSA status review	• Formal appeals process
• Evaluating reclassification requests	• Developing new job descriptions
• Pay plan scenario modeling	• Training for supervisors and leadership
• Employee communications support	• Benefits comparative analysis

This **is not** included in the project's scope but is recommended if the City might foresee a need to address any of the above-listed tasks through an unaffiliated third party or if the HR staff may require additional capacity to manage these requests internally.

The engagement team has been intentionally selected to align with project goals. Each phase will be led by a Certified Compensation Professional supported by managers and analysts as outlined in Part B of this document.

Meeting the City's deadlines

Timing is everything

They say time is money, and we agree. We'll collaborate closely with you to finalize a client service plan that meets all your needs — especially your timing. We are prepared to initiate your classification and compensation study within two weeks of receiving the official notice to proceed.

ANTICIPATED PROJECT TIMELINE IN MONTHS*

Project phase	1	2	3	4	5	6
Phase 1 – Project initiation	■	■				
Phase 2 – Classification			■	■		
Phase 3 – Compensation				■	■	■
Phase 4 – Pay plan development					■	■
Phase 5 – Project completion						■

** Please note that there are factors impacting the project schedule that are beyond the consulting team's control, such as holidays that impact office closures. Baker Tilly will promptly advise the City if any factors impact the project timeline.*

Explaining the City's responsibilities

Proper planning and collaboration are vital to ensure the efficient and successful execution of the City's classification and compensation study.

- **Project team.** Baker Tilly will work closely with the City's project team and recommends establishing standing 15- to 30-minute bi-weekly meetings for the duration of the project.
- **Data collection.** Baker Tilly will prepare a detailed data request outlining the necessary information to perform these services. The data will be requested in a format compatible with Baker Tilly's computer system and project tools (Microsoft Excel and Word). Baker Tilly will examine the data for missing information and consistency upon receipt.
- **Position analysis questionnaires.** The price and scope of the project outlined assume the collection of online PAQs for all position titles included in the study. If there are vacancies, absences or employees unwilling or unable to participate, Baker Tilly will work with the City's project team to identify the appropriate alternative staff to submit documentation for those positions.
- **Salary and benefits data.** Baker Tilly's ability to provide fair and defensible recommendations about pay and benefits is contingent upon the availability of that data. Baker Tilly may request the City's project team or leadership to contribute to outreach efforts to collect necessary data from public peer organizations and keep the project on schedule.
- **Review of and feedback on preliminary results.** Baker Tilly encourages clients to be involved in significant decisions regarding preliminary results that will ultimately drive the study's outcomes. Baker Tilly is familiar with the ebb and flow of local government operations and will be flexible in coordinating with the City to keep the project on track as much as possible.

Sample final report and sample job description

Samples of deliverables can be found throughout Part C 'Project approach and work plan' section. If Baker Tilly is selected as a final, additional samples can be provided if desired.

A sample job description is available in Appendix B: Sample job descriptions

Part D: References

Don't just take our word for it. Talk with similar clients to learn how we help them overcome challenges and reach new heights.

Demonstrating that we've been down this path before

CITY OF SIOUX CITY, IA			
Name	Janelle Bertrand	**Title**	Human Resources Director
Phone	712-279-6175	**Email**	jabertrand@sioux-city.org
Services	Classification and compensation study.		

CITY OF MARION, IA			
Name	Ryan Waller	**Title**	City Manager
Phone	319-743-6301	**Email**	rwaller@cityofmarion.org
Services	Classification and compensation study.		

JOHNSON COUNTY, IA			
Name	Lindsey Jones	**Title**	Human Resources Director
Phone	319-688-8075	**Email**	ljones@johnsoncountyiowa.gov
Services	Classification and compensation study.		

PROVIDING VALUABLE PERSPECTIVES FROM CURRENT CLIENTS

At Baker Tilly, relationships matter. Our team has a record of successfully enhancing and protecting similar clients' goals — resulting in experience-based insights for the City.

Reference 1:

Client Name:	City of Sioux City, IA
Contact Person & Title:	Janelle Bertrand, Human Resources Director
Phone:	712-279-6175
Email:	jabertrand@sioux-city.org
Brief Description of Project:	Classification and compensation study.

Reference 2:

Client Name:	City of Marion, IA
Contact Person & Title:	Ryan Waller, City Manager
Phone:	319-743-6301
Email:	rwaller@cityofmarion.org
Brief Description of Project:	Classification and compensation study.

Reference 3:

Client Name:	Johnson County, IA
Contact Person & Title:	Lindsey Jones, Human Resources Director
Phone:	319-688-8075
Email:	ljones@johnsoncountyiowa.gov
Brief Description of Project:	Classification and compensation study.

Part F: Acknowledgement form

A filled Acknowledgement form (Section 4) is attached on the following page.

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	Baker Tilly Advisory Group, LP
Mailing Address:	205 N Michigan Ave, 28th Floor, Chicago, IL 60601-5927
Website:	bakertilly.com
Year Firm Established:	1931
Office Location Performing the Work:	30 E Seventh St, Suite 3025 St. Paul, MN 55101
Primary Contact Person:	Jada Kent
Title:	Managing Director
Phone:	+1 (972) 748 0514
Email:	jada.kent@bakertilly.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [✓] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [✓] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

the exterior with: **"SEALED COST PROPOSAL – SALARY STUDY"**.

Technical Proposal Contents:

- [x] **Part A: Transmittal Letter:** A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [x] **Part B: Firm Experience and Qualifications:**
  - [x] Firm history, size, and ownership structure.
  - [x] Detailed experience with public sector classification and compensation studies.
  - [x] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [x] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [x] **Part C: Project Approach and Work Plan:**
  - [x] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [x] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [x] A sample of a final report from a previous, similar municipal project.
  - [x] A sample of a job description from a previous, similar municipal project.
- [x] **Part D: References:**
  - [x] At least three (3) references from public sector clients (use Section 3 of this form).
- [x] **Part F: Acknowledgement Form (Section 4 of this form):** Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [x] All-inclusive, "not-to-exceed" total project cost.
- [x] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [x] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Provide at least three (3) references from public sector clients for whom similar work was completed within the last five years.

Reference 1:

Client Name:	City of Sioux City, IA
Contact Person & Title:	Janelle Bertrand, Human Resources Director
Phone:	712-279-6175
Email:	jabertrand@sioux-city.org
Brief Description of Project:	Classification and compensation study.

Reference 2:

Client Name:	City of Marion, IA
Contact Person & Title:	Ryan Waller, City Manager
Phone:	319-743-6301
Email:	rwaller@cityofmarion.org
Brief Description of Project:	Classification and compensation study.

Reference 3:

Client Name:	Johnson County, IA
Contact Person & Title:	Lindsey Jones, Human Resources Director
Phone:	319-688-8075
Email:	ljones@johnsoncountyiowa.gov
Brief Description of Project:	Classification and compensation study.

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY. List Addenda Numbers received:
   ADDENDUM NO. 1, Date of Addendum: November 4, 2025
   ADDENDUM NO. 2, Date of Addendum: November 4, 2025
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	
Printed Name:	Jada Kent
Title:	Managing Director
Date:	11/14/2025

PART F: ACKNOWLEDGEMENT FORM

Appendix A: Engagement team member resumes

MANAGING DIRECTOR | PRACTICE LEADER

Jada Kent, MPA, CCP, CLRP

Jada Kent is a managing director within Baker Tilly's public sector advisory practice and has been with the firm since 2015.

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jada.kent@bakertilly.com

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Education

Master of Legal Studies, Human Resources and Employment Law
Texas A&M, School of Law
(Fort Worth, Texas)

Master of Public Affairs, Local Government Management
University of Texas – Dallas
(Dallas, Texas)

Bachelor of Arts in U.S. history
University of North Texas
(Denton, Texas)

Jada is a managing director and practice leader for Baker Tilly's classification and compensation consulting team. She has more than 10 years of combined experience in providing human resources consulting services to public sector organizations, including executive recruitment and organizational management, with Waters Consulting Group and Springsted Inc., before its combination with Baker Tilly.

Jada leads the compensation consulting practice within Baker Tilly's public sector advisory group and has experience delivering a range of services related to job classification, base pay market analysis and pay plan development to clients nationwide.

Formerly, Jada served active duty as a public affairs specialist with the 7th Mobile Public Affairs Detachment in the United States Army and with the 136th Airlift Wing in the Texas Air National Guard, respectively.

Specific experience

- Expertise in public sector compensation: Provides strategic guidance to clients on legal compliance and competitiveness.
- Compliance reviews: Conducts comprehensive reviews of compensation plans and pay policies to ensure adherence to FLSA, ADA, EEOC, pay equity and other state and local regulations.
- Market analysis: Utilizes industry best practices to conduct salary gap analysis through custom market surveys, assisting clients in defining their competitive labor market and desired market position.
- Job classification systems: Develops and implements job classification systems to ensure roles are accurately categorized based on responsibilities, skills and qualifications. This helps maintain internal equity and supports effective talent management. Includes providing recommendations for title changes and updates to job documentation.
- Base pay structure development: Develops new base pay structures or revisions to existing structures to ensure competitiveness in attracting and retaining talent.
- Creative compensation solutions: Collaborates with clients to implement innovative classification and compensation plans, addressing pay equity and compression issues, and providing costing analysis for budgeting.
- Stakeholder collaboration: Works closely with HR teams, managers and executives to gather and incorporate input. Facilitates workshops and training sessions to communicate changes and gain buy-in.

MANAGING DIRECTOR | PRACTICE LEADER

Jada Kent, MPA, CCP, CLRP

Continuing professional education

- Certified Compensation Professional (CCP) – World at Work
- Certified Labor Relations Professional (CLRP) – NPELRA
- *Certified Benefits Professional (CBP) – World at Work – in progress*
- *Global Remuneration Professional (GRP) – World at Work – in progress*

Thought leadership

- "Public sector work-from-home policies: For local governments, the time is now," bakertilly.com, March 2025
- "Compensation Trends for Entry Level HR." North Texas Compensation Association Career Expo, April 2023
- "Interview Do's and Don'ts," Texas Women's Leadership Institute, March 2023
- "Keys to conducting a successful market survey," Indiana Water Environment Association (IWEA) Annual Conference, August 2022
- "Managing an Evolving Workforce," Crossroads of American Leadership Summit, June 2022
- "Don't Leave! Keeping Employees in a Tight Labor Market," IPMA-HR Central Region Conference, June 2022
- "Balancing Internal Equity & Market Competitiveness in the Public Sector," North Texas Compensation Association, Virtual Luncheon, April 2022
- "Proactively Gain Buy-In for a Classification and Compensation Study: Tips and Ideas," ElectriCities of North Carolina, Connection Summit 2022
- "Your organization's compensation philosophy: what is it, what should it contain and why is it important?" Accelerated Indiana Municipalities Ideas Summit 2021
- "Implementing a successful Classification and Compensation Study," Wisconsin GFOA Human Resources Conference, September 2021
- "In a World Competing for Hard-to-find Talent, Skill-Based Pay can be your Secret Weapon," Illinois County/County Management Association Newsletter, September 2021
- "Salary benchmarking: selecting peer organizations for comparison," bakertilly.com 2021
- Panelist on "Talent management in a post-pandemic world," Resiliency on the Rise: Baker Tilly Public Sector Virtual Summit, June 2021
- "Don't be a (title) creep," bakertilly.com 2021
- "Keeping classification and compensation up-to-date during COVID-19," CommuniTIES: A Baker Tilly public sector podcast, October 2020
- Panelist on "How to attract and retain talent in organizations," University of Texas at Dallas, Public & Non-profit Management Program 2020

MANAGER

Candi Harris, MPA

Candi Harris, a manager in Baker Tilly's public sector human capital advisory practice, has been with the firm since 2025.

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Suite 800
Frisco, TX 75034
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bakertilly.com

Education

Master of Public Administration
Bachelor of Arts in English
Sam Houston State University
(Huntsville, Texas)

Candi is a manager with experience engaging diverse stakeholder groups, managing a variety of programs, and developing effective learning and development solutions, drawing on nearly 20 years of experience across the higher education and local government sectors. She successfully led the development of several high-impact programs at a reputable university.

Before joining Baker Tilly, Candi led the planning and development efforts for policy administration and organizational development for the City of Denton. Candi aims to support leaders as they build healthy, more effective organizations while improving the lives of their most valuable resource: people.

Specific experience

- Human resources program/project management
- Conducting needs assessments
- Policy administration
- Human resources policy compliance review
- Design and facilitation of learning and development experiences

Continuing professional education

- Association for Talent Development (ATD) Master Trainer®
- Leadership Professional in Ethics and Compliance (LPEC) designation

MANAGER

Emily Hayes

Emily Hayes is a manager in Baker Tilly's public sector human capital advisory practice.

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bakertilly.com

Education

Master of Science, information management
University of Washington
(Seattle, Washington)

Bachelor of Arts, international studies
American University
(Washington, DC)

Emily has served a diverse range of clients since joining Moss Adams in 2011, delivering a broad array of consulting, internal audit and in-depth research services. Her passion is for helping clients identify, evaluate and implement opportunities for improvement by providing strategic, operational and risk management consulting services. Emily's background in research and information management drives her commitment to connecting clients with meaningful, actionable information as part of every engagement.

Specific experience

- Her professional areas of focus include assessing and streamlining business processes for effectiveness and efficiency; delivering data transformation support services; strengthening organizational resilience through business continuity and contingency planning; and supporting organizations through mitigating inherent and emerging risks.
- Emily leads the delivery of targeted research and analysis services, including the development and administration of surveys; developing and tracking performance measures; financial, operational and compensation benchmarking; and economic, industry and market analysis.
- Her municipal clients include the City of Abilene, City of Bakersfield, City of Berkeley, City of Corona, City of Creswell, City of Culver City, City of Cupertino, City of El Paso De Robles, City of Eugene, City of Fresno, City of Glendale, City of Laguna Niguel, City of Menlo Park, City of Modesto, City of New Port Richey, City of Newport Beach, City of Palo Alto, City of Patterson, City of Portland, City of Redondo Beach, City of Renton, City of Roseville, City of Salem, City of San Jose, City of Santa Monica, City of Santa Rosa, City of Stockton, City of Vancouver and City of Wasilla.
- Her state government clients include California State Lottery, Oregon Department of Justice, State of Utah, Utah State Board of Education, Washington State Department of Labor and Industries, Washington State Department of Transportation, and Washington State Employment Security Department.

SENIOR MANAGER

Jessie Lenhardt, PMP

Jessie Lenhardt is a senior manager in Baker Tilly's environmental, social and governance practice.

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Seattle, WA 98104
United States

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jessie.lenhardt@bakertilly.com

bakertilly.com

Education

Master's degree in organizational leadership
Gonzaga University
(Spokane, Washington)

Bachelor's degree in art history
University of Oregon
(Eugene, Oregon)

Jessie is a leader in the firm's environmental, social and governance (ESG) advisory practice. As a dedicated professional, she specializes in organizational development work, including strategic planning, succession planning, process improvement, organizational and operational assessments, compensation benchmarking and structure and staffing assessments. Jessie brings a deep understanding of the dynamics that shape an effective organization, offering a unique blend of strategic thinking and operational acumen to her work.

Known for her collaborative approach, integrity and solution-oriented mindset, Jessie consistently delivers sustainable improvements that align with broader organizational goals.

Jessie works with clients in both the public and private sectors, across several industries, including state, local and tribal governments, construction, not-for-profit organizations, higher education, healthcare and technology.

Specific experience

- Collaborates with clients to navigate ESG complexities and implement sustainable, value-driven business practices
- Provides strategic guidance to organizations at all stages of their ESG journey, including strategy development, risk assessment, reporting, policies, procedures and governance practices
- Supports strategic planning and succession planning efforts to align workforce capabilities with long-term organizational objectives
- Identifies opportunities for process improvement and implements targeted interventions to enhance efficiency and innovation
- Works with clients across industries to develop tailored strategies that support integrated business practices and future growth
- Provides strategic guidance to organizations at all stages of their ESG journey, including strategy development, risk assessment, reporting, policies, procedures and governance practices

Industry involvement

- Project Management Institute
- International Financial Reporting Standards Foundation
- International City & County Management Association
- Association of Local Government Auditors

MANAGER

Madeline Scott

Madeline Scott, a manager in Baker Tilly's public sector human capital advisory practice, has been with the firm since 2025.

Baker Tilly Advisory Group, LP

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Denver, CO, 80237
United States

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madeline.scott@bakertilly.com

bakertilly.com

Education

Masters of Infrastructure Planning & Management
University of Washington
(Seattle, Washington)

Bachelor of Science in physics
University of Washington
(Seattle, Washington)

Madeline brings a decade of experience in the public sector, specializing in data analysis, human resources and compensation. At the State of Colorado, she led a high-performing compensation team responsible for daily operations, executive compensation and strategic initiatives that advanced pay equity and transparency in her agency. Her work included leading agency-wide pay equity audits, developing data-driven compensation systems and ensuring compliance with overlapping laws, rules and regulations. Madeline has also managed complex compensation strategy and process innovations, including implementing HR data systems to streamline equitable pay decisions. She is recognized for developing inclusive systems that foster transparency and informed decision-making. At Baker Tilly, Madeline collaborates closely with clients to design tailored solutions grounded in data, compliance and best practices aligned with each organization's mission and values.

Madeline collaborates with public sector clients to develop strategic, equitable and compliant workforce solutions. Her approach combines deep regulatory knowledge with practical change management and implementation support to help organizations achieve their goals.

Specific experience

- Designing pay plans and career ladders to enhance recruitment, retention and employee development
- Compensation policy development, analysis and revision
- Executive compensation analysis and strategy
- Developing innovative compensation and classification solutions to address compression, pay equity and retention across evolving budget seasons
- Building and facilitating training and workshops for employees, managers and executive leaders on compensation programs, pay equity and policy changes

Industry involvement

- Rocky Mountain Total Rewards Association
- World at Work

Community involvement

- Strength For All Bodies – Lakewood, CO

MANAGER

Sarah E. Towne, MPA, CCA

Sarah Towne, a manager with Baker Tilly's public sector human capital advisory practice, has been with the firm since 2022.

Baker Tilly Advisory Group, LP

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Charlotte, NC 28277
United States

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sarah.towne@bakertilly.com

bakertilly.com

Education

Master of Public Administration
Graduate certificate in women's studies
Appalachian State University
(Boone, North Carolina)

Bachelor of Arts in sociology and applied business
University of Colorado
(Boulder, Colorado)

Sarah is a manager with a background in higher education, local government and human resources management. With a robust background in higher education and public sector advisory, Sarah excels in providing strategic guidance on complex compensation structures and pay equity analysis to ensure competitive, fair and defensible outcomes for clients.

Before joining Baker Tilly, Sarah was an adjunct faculty member and course coordinator for the online MPA program at the University of North Carolina's School of Government.

Specific experience

- Technical expertise in compensation analysis, pay structure design and regulatory compliance
- Spearheaded the development of a pay equity service line at Baker Tilly, which multiple clients have adopted
- Published research in human resources management, workplace policies and programs, family-friendly policies and gender and diversity in the public sector
- Strategic human resources management research in North Carolina and Virginia local governments, including qualitative and quantitative data collection and analysis
- Wage gap and pay equity research and analysis using publicly available data, federal employment surveys, BLS and Census data

Industry involvement

- American Society for Public Administration (ASPA)
  - Section for Personnel Administration and Labor Relations (SPALR), board member
  - Section for Women in Public Administration (SWPA), member
- Southeastern Conference for Public Administration (SECoPA)

Continuing professional education

- Certified Compensation Analyst (CCA) – Compensation Analyst Academy

Baker Tilly Advisory Group, LP

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Education

Master of Arts in Management
Wake Forest University
(Winston Salem, North Carolina)

Bachelor of Arts in economics; minor in management and organization
Spelman College
(Atlanta, Georgia)

Marti is a consultant with the compensation consulting group within Baker Tilly's Public Sector Advisory practice. She has a background in human resources, focusing on public sector recruitment and selection.

Prior to joining Baker Tilly, Marti worked as a human resources analyst in local government and a human resources technician in higher education.

Specific experience

- Human resources management
- Recruitment and selection
- Workforce planning
- Data analysis
- Support services with a client-focused approach

Continuing professional education

- Certified Compensation Analyst (CCA) – Compensation Analyst Academy

SENIOR CONSULTANT

Thomas Patton

Thomas Patton, a senior consultant in Baker Tilly's public sector human capital advisory practice, has been with the firm since 2019

Baker Tilly Advisory Group, LP

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United States

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thomas.patton@bakertilly.com

bakertilly.com

Education

Bachelor of Science in human resources development
University of Minnesota
(Twin Cities)

Thomas is a senior consultant for the human capital practice, focusing on data collection and analysis, as well as job description formulation and writing. He contributes to the team's endeavors by securing quality data to facilitate successful compensation and benefits studies. Thomas also supports the team by drafting job descriptions for positions being studied within a project. His expertise enables the team to coordinate projects effectively and ensures smooth transitions between phases. He brings abundant knowledge from working with governmental entities in states such as Arizona, Indiana, Kansas, Minnesota, Virginia, Washington and Wisconsin.

Specific experience

- Assisting with compensation and benefits project coordination
- Collecting and submitting employee positional analysis questionnaires
- Coordinating compensation and benefit surveys
- Performing data entry and analysis
- Providing client support services

Continuing professional education

- Certified Compensation Analyst (CCA) – Compensation Analyst Academy

ANALYST

Daniel Tejada

Daniel Tejeda, an analyst in Baker Tilly's public sector human capital advisory practice, has been with the firm since 2025.

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Bakertilly.com

Education

Bachelor of Science in psychology
Bachelor of Science in criminal justice/criminology
Florida State University
(Tallahassee, Florida)

Daniel is a compensation analyst on the public sector advisory team with a background in local government and compensation consulting. Before joining Baker Tilly, Daniel worked as a human resources data analyst for local governments. He worked on over 75 compensation and benefits studies, analyzing salary data for more than 100,000 employees across multiple industries. Daniel provides support work on compensation, classification and other HR related studies for public sector clients. Working with managers and other consultants, Daniel helps provide high level workforce and compensation solutions.

Specific experience

- Analyzing and managing large datasets, including salary structures, job descriptions and benefits information to support compensation and classifications studies.
- Conducting large-scale compensation studies, resulting in organization-wide pay structure improvements.
- Providing data-driven recommendations that enhance recruitment strategies.

ANALYST

Anna Yin

Anna Yin, an analyst in Baker Tilly's public sector human capital advisory practice, has been with the firm since 2025.

Baker Tilly Advisory Group, LP

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Suite 2200
New York, NY 10001
United States

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anna.yin@bakertilly.com

bakertilly.com

Education

Bachelor of Arts in economics and psychology with a minor in business studies
New York University
(New York, New York)

Anna is a compensation analyst at Baker Tilly, specializing in data-driven compensation strategies for public sector clients. She advises municipalities, government agencies and public organizations on job evaluation, market assessment and pay structure design. Anna brings prior experience from two other consulting firms, where she contributed to compensation projects across various industries.

Appendix B: Sample job description

CITY OF PASO ROBLES
FIREFIGHTER

Class Spec Code:
7000

Established Date:
TBD

Salary Range:
13

Bargaining Unit:
IAFF

Occupational Group:
700N

Benefit Code:
IAFF

EEO:
Protective Service

FLSA:
Non-Exempt

Physical Class:
Emergency Services

DESCRIPTION

Job Summary
Performs intermediate work suppressing fires. Responds to all emergencies, medical aids, fires, vehicle accidents, and HAZMAT incidents. Provides public education with regards to risk reduction and performs fire safety and code enforcement inspections.

Supervision Required
Work is performed under the moderate supervision of the Fire Captain.

Supervision Exercised
None.

Impact on Organization
Daily actions or services affect individual clients/citizens; activity has moderate impact on specific cases in service area.

TYPICAL DUTIES

The following duties are typical of this classification. Incumbents may not perform all of the duties set forth below and/or may be required to perform additional related duties to address City needs and changing business practices.

- Responds to fire, medical, and other emergencies.
- Renders basic life support medical skills.
- Takes appropriate action to protect life, provide for incident stabilization, property conservation, and protect the environment using a proper risk assessment.
- Connects and lays hose lines; enters burning area, including structures, grass and brush fires, with hose lines, foam and other extinguishing agents.
- Assists in operation of nozzles and directing water streams.
- Operates a variety of auxiliary firefighting equipment.
- Assists in educating the public in emergency preparedness measures.
- Participates in code enforcement/fire prevention measures.
- Performs residential and commercial building inspections.
- Maintains current knowledge of firefighting, rescue, and emergency medical service procedures.
- Participates in pre-fire planning.

CITY OF PASO ROBLES

FIREFIGHTER *continued*

Class Spec Code:
7000

Established Date:
TBD

Salary Range:
13

Bargaining Unit:
IAFF

Occupational Group:
700N

Benefit Code:
IAFF

EEO:
Protective Service

FLSA:
Non-Exempt

Physical Class:
Emergency Services

- Maintains and services fire vehicles and equipment.
- Cleans and maintains fire stations.
- Maintains good physical condition.
- Performs other tasks as required.

EMPLOYMENT STANDARDS

Knowledge of:

- Principles, practices, methods, and procedures of modern firefighting. Includes prevention, inspection, emergency response, rescue medical aid, maintenance of firefighting equipment and apparatus.
- Basic organization and function of public agencies, including the role of an elected City Council.
- Federal, State, and City codes, regulations, policies, agreements, technical processes, and procedures related to City and departmental activities.
- Applicable laws, rules and regulations.
- Standard office administrative practices and procedures, including the use of standard office equipment.
- Business letter writing, techniques for preparing informational materials and the standard format for reports, correspondence, and other written materials.
- English usage, spelling, grammar, and punctuation.
- Computer applications related to the work, including word processing, database, and spreadsheet applications.
- Records management principles and practices.
- Principles and practices of management and supervision.
- Occupational safety and health rules and regulations.
- Techniques for providing a high level of customer service to the public, representatives of other agencies, and City staff, in person and over the telephone.

Skill in:

- Maintaining firefighting equipment and apparatus.
- Rendering emergency medical care at the emergency medical technician 1 level.

CITY OF PASO ROBLES

FIREFIGHTER *continued*

Class Spec Code:
7000

Established Date:
TBD

Salary Range:
13

Bargaining Unit:
IAFF

Occupational Group:
700N

Benefit Code:
IAFF

EEO:
Protective Service

FLSA:
Non-Exempt

Physical Class:
Emergency Services

- Maintaining sound judgment, remaining calm, and making decisions in emergency situations.
- Compiling information from varied sources and preparing accurate records and reports.
- Composing correspondence, information materials and reports independently or from brief instructions.
- Making accurate arithmetic and statistical calculations.
- Using English effectively to communicate in person, over the telephone and in writing.
- Using initiative and independent judgment within established policy and procedural guidelines.
- Organizing own work, initiating processes, coordinating projects, setting priorities, meeting critical deadlines, and following up on assignments with a minimum of direction.
- Taking a proactive approach to customer service issues.
- Data entry into standard computer formats and producing correspondence and reports with speed and accuracy sufficient to perform assigned work.
- Establishing and maintaining effective working relationships with those contacted in the course of the work.

Human Relations and Communications Skills
Regular contact within the department and other departments, outside agencies, and the general public (supplying or seeking information) on specialized matters.

Analytical Skills and Complexity
Considerable analytical ability is needed to select, evaluate, and interpret data from several sources; interpretation of guidelines, policies and procedures is required.

Education and Experience
A typical way of obtaining the knowledge, skills and abilities outlined above is:

- High School Diploma or GED.

CITY OF PASO ROBLES

FIREFIGHTER *continued*

Class Spec Code:
7000

Established Date:
TBD

Salary Range:
13

Bargaining Unit:
IAFF

Occupational Group:
700N

Benefit Code:
IAFF

EEO:
Protective Service

FLSA:
Non-Exempt

Physical Class:
Emergency Services

LICENSES AND CERTIFICATIONS

Requires possession of the following:

- State Firefighter 1 Academy Certificate from an accredited agency recognized by the State Fire Marshall or agency having authority and/or State Firefighter I Certificate issued by the Office of State Fire Marshall, IFSAC, or PRO Board.
- Valid California or National Registry Emergency Medical Technician I Certificate.
- At a minimum possession, a valid California Class C Driver's License.
- San Luis Obispo County Emergency Medical Services Agency requirements for expanded Emergency Medical Technician skills, within 90 days of appointment.
- State Firefighter I Certificate, within 24 months if not in possession at time of appointment.

PHYSICAL DEMANDS

Physical Requirements
Work regularly requires standing, walking, using hands, reaching with hands and arms, tasting or smelling, pushing or pulling and repetitive motions; frequently requires speaking or hearing, climbing or balancing and kneeling or crawling; occasionally requires sitting. This work requires regular exertion of up to 10 pounds of force, frequent exertion of up to 25 pounds of force and occasional exertion of over 100 pounds of force.

Vision Requirements
Work requires close vision, distance vision, ability to adjust focus, depth perception, color perception, night vision and peripheral vision.

Hearing Requirements
Hearing is required to receive detailed information through oral communication and/or to make fine distinctions in sound.

Speech Requirements
Vocal communication is required for conveying detailed or important instructions to others accurately, loudly or quickly.

Sensory Requirements
Work requires preparing and analyzing written or computer data, visual inspection involving small defects and/or small parts, use of measuring

CITY OF PASO ROBLES

FIREFIGHTER *continued*

devices, operating machinery, operating motor vehicles or equipment and observing general surroundings and activities.

Noise Level
Work is generally in a loud noise location (e.g. heavy traffic, large equipment).

Environmental Exposure
Work regularly requires exposure to wet/humid conditions (non-weather), working near moving mechanical parts, exposure to fumes or airborne particles, exposure to toxic or caustic chemicals, exposure to outdoor weather conditions, exposure to extreme heat (non-weather), exposure to vibration, wearing a self-contained breathing apparatus and exposure to bloodborne pathogens (may be required to wear specialized personal protective equipment); occasionally requires working in high/precarious places, exposure to extreme cold (non-weather) and exposure to the risk of electrical shock.

OTHER REQUIREMENTS

Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.

Class Spec Code:
7000

Established Date:
TBD

Salary Range:
13

Bargaining Unit:
IAFF

Occupational Group:
700N

Benefit Code:
IAFF

EEO:
Protective Service

FLSA:
Non-Exempt

Physical Class:
Emergency Services

Proposal for a Classification and Compensation Study

Prepared for the City of Independence, Iowa

November 20, 2025

CBIZ Compensation Consulting
721 Emerson Road, Suite 400
St. Louis, MO 63141
(314) 692-2249

Matthew R. Schmitz
City Manager
City of Independence, Iowa
331 1st Street E
Independence, IA 50644

Dear Matthew:

In response to your request for proposal for a Classification and Compensation Study, CBIZ Benefits & Insurance Services, Inc. d/b/a CBIZ Compensation Consulting ("CBIZ" or "the Firm") is pleased to present the following proposal describing how we can provide assistance to the City of Independence, Iowa (the "City").

In serving the City, we will provide you with the highest quality of professional service. We will bring extensive resources, experience, fresh ideas and approaches, responsiveness to your interests, and sound judgment.

We are excited about this opportunity and look forward to working with you. The following proposal is valid for 90 days. Please let me know if you desire any additional information or explanation.

Sincerely,

Ryan Blackwell, CCP
Director, Compensation Consulting
Primary Client Contact
(314) 692-5801
RBlackwell@CBIZ.com

Nancy M. Mellard
Executive Vice President and General Counsel
Authorized Agent

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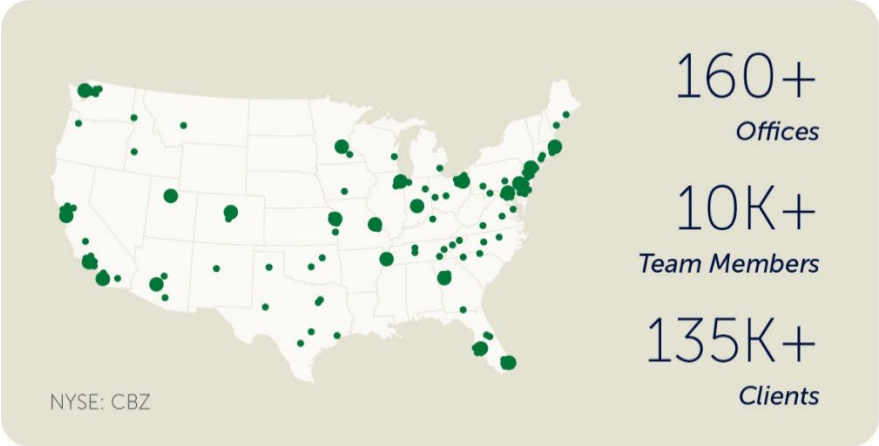
Part A: Firm Experience and Qualifications

About CBIZ

CBIZ Benefits & Insurance Services, Inc., doing business as CBIZ Compensation Consulting, will assist the City on this engagement. CBIZ Benefits & Insurance Services, Inc. is a wholly-owned subsidiary of CBIZ, Inc.

CBIZ, Inc. (NYSE: CBZ) is a national professional services advisor with annual revenue of approximately $2.8 billion. Headquartered in Cleveland, Ohio, CBIZ offers accounting, tax, advisory, benefits, insurance, and technology services from over 160 offices and through more than 10,000 associates located throughout the United States.

The CBIZ Compensation Consulting practice is located in St. Louis, Missouri and has a team of 19 consultants dedicated solely to compensation consulting services.



National Resources; *Personal Service*

We provide the same expertise and data as the other national firms; however, our focus is on the middle market. The Firm was founded on the premise that middle-market organizations are more complex and move faster in today's interconnected world.

Edward R. Rataj, the Firm's Compensation Consulting Division Managing Director, is a Master Certified Compensation Professional (MCCP). His compensation expertise has been cited in media publications such as the Wall Street Journal and Smart Money magazine. Few competitors can offer such compensation experience and expertise.

Our unique industry experience and relationships, coupled with our highly skilled technical experts, means we will do much more than walk you through a process. We can deliver optimal results and value in an efficient manner by working closely with the City.

Compensation Experts in the Public Sector

Many organizations face the challenge of balancing competitive compensation with regulatory compliance and ever-evolving employee expectations. Attracting top talent, navigating pay transparency, achieving pay equity, and minimizing pay compression all add layers of complexity.

In the public sector, we recognize the unique balance between taxpayer interests and the need to offer competitive compensation packages. CBIZ focuses on creating equitable and transparent compensation structures that comply with regulatory requirements while addressing the specific needs of public service professionals.

At CBIZ, we go beyond data by implementing practical, strategic solutions that directly address your unique compensation challenges. From designing salary structures that ensure competitiveness and equity, to alleviating pay compression, and ensuring ongoing policies support compensation philosophy goals, we deliver comprehensive plans that advance philosophies and goals.

Our compensation consulting services are anchored in benchmarking data relevant to your competitive landscape with a comprehensive implementation and salary administration plan that enhances your overall talent strategy, helping to attract high-caliber talent without risking internal imbalances.

CBIZ combines deep expertise with a sharp focus on the fine details that make compensation programs sustainable and impactful. While data is widely available, it's our commitment to thoughtful design and practical administration that sets us apart, helping clients move from insight to action.

With CBIZ, clients see higher job acceptance rates, attract higher caliber talent, reduce turnover, and build greater trust and satisfaction among employees—establishing a stable, motivated workforce that understands and values their compensation.

Similar Engagements

CBIZ frequently conducts classification and compensation studies for our public sector clients. Projects similar to that requested by the City that have been recently performed by CBIZ are listed below. CBIZ would be happy to provide additional references upon request.

- City of Nixa, Missouri
- City of Republic, Missouri
- Johnson County Kansas
- Tazewell County Illinois
- City of Spring Hill, Missouri

Service Team

Our Firm's ability to provide quality, efficient and timely service is largely dependent upon the skills and experience of our people. We are proud to present a team of individuals who have a proven record of bringing the necessary blend of technical competence, industry experience, innovative ideas and suggestions, and value-added services to our clients. Our philosophy of utilizing highly experienced personnel allows us to perform extremely efficiently and enables us to provide unmatched quality.

Ryan Blackwell, Ed Rataj, Carrie Blackwell, Taylor Sprague, Grant Gardiner, Gaby Davidson, and Elise Fuller will be responsible for the services provided. The service team will be assisted by other qualified human resources consulting professionals, as necessary.

Consulting Director

Ryan Blackwell

Ryan will manage and oversee all aspects of the project and serve as the primary client contact.

Ed Rataj, CCP, CECP, ACCP, MCCP

Ed will provide strategic oversight for the project as the head of the compensation consulting practice.

Project Managers

Carrie Blackwell

Carrie will lead the day-to-day project activities, providing guidance, timeline management, and quality control to consultants.

Consultants

Taylor Sprague, Grant Gardiner, Gaby Davidson, and Elise Fuller

Taylor, Grant, Gaby, and Elise will provide day-to-day technical and client service, assisting with all facets of the compensation analyses.

Professional Summaries

Ryan Blackwell, CCP

Director, Compensation Consulting

University of Missouri-Columbia, M.B.A.
University of Missouri-Columbia, B.S. Finance

Mr. Blackwell is a Director for CBIZ Compensation Consulting in the St. Louis, Missouri, office where he has twelve years of experience advising clients with all facets of compensation plan design and analysis. He oversees a team of compensation consultants and provides project management oversight and quality control. Since joining CBIZ, Mr. Blackwell's experience includes assisting clients with base salary compensation plan design, incentive programs, benefits, total rewards, and executive compensation in the public sector and in a wide range of industries.

Mr. Blackwell obtained his Master of Business Administration degree from the University of Missouri-Columbia, where he gained consulting experience by performing competitive analysis for clients in the service and distribution industries. He is a member of the Compensation and Benefits Network of Greater St. Louis and is a Certified Compensation Professional (CCP).

Edward R. Rataj, CCP, CECP, ACCP, MCCP

Senior Managing Director

Miami University (Ohio), B.S. Finance

Mr. Rataj is the Managing Director of the Compensation Consulting Division of CBIZ. He has twenty years of experience in the area of human resources, focusing on designing innovative compensation programs.

Prior to joining the Firm, Mr. Rataj served as a Compensation Consultant for Mellon (formerly known as Buck Consultants) and was employed by William M. Mercer. Mr. Rataj assists clients in the design and implementation of strategic base salary and incentive programs. His core areas of expertise include designing market-based and job evaluation-based compensation programs, pay structures, and compensation surveys, as well as developing policies and procedures. Additionally, Mr. Rataj has experience in consolidating compensation plans for organizations completing mergers and acquisitions. He has consulted with numerous clients in various industries.

Mr. Rataj is a Certified Compensation Professional (CCP), Advanced Certified Compensation Professional (ACCP), Certified Executive Compensation Professional (CECP), Master Certified Compensation Professional (MCCP), served as the President of the Compensation and Benefits Network of Greater St. Louis (CBN) and is a member of WorldatWork (formerly known as the American Compensation Association). In addition, Mr. Rataj has been recently quoted in the Wall Street Journal, Smart Money magazine and TheStreet.com as an expert in the area of compensation.

Carrie Blackwell, CCP

Senior Project Manager, Compensation Consulting

Missouri State University, B.S. Human Resources Management

Mrs. Blackwell oversees a team of compensation consultants and provides project management oversight and quality control. She has over 20 years of experience in a corporate setting managing broad based compensation programs in both the public and private sectors.

Mrs. Blackwell holds a B.S. degree in Human Resources Management and holds the accreditation, Certified Compensation Professional (CCP).

Taylor Sprague, CCP

Lead Compensation Consultant

University of Missouri-Columbia, B.S. Human Environmental Science

Mr. Sprague is a Lead Consultant at CBIZ Compensation Consulting, based in the Denver office. He specializes in market analysis and compensation plan design, leveraging industry surveys to assess a wide range of positions across various industries and organizations. His expertise includes conducting large custom compensation surveys, evaluating job questionnaires, and developing tailored compensation survey reports for targeted industry benchmarking.

Mr. Sprague is a Certified Compensation Professional (CCP). Mr. Sprague received a B.S. in Human Environmental Science with an emphasis in Personal Financial Planning, and a minor in Business from the University of Missouri-Columbia.

Grant Gardiner

Senior Compensation Consultant

University of Missouri-Columbia, B.A. Business Management

Mr. Gardiner is a Consultant with CBIZ Compensation Consulting working out of the St. Louis office. His focus is on organization-wide compensation studies, specializing in market analysis and compensation plan design. He has worked with a wide range of organizations, with particular experience in the higher education, non-profit, and governmental industries. In addition to his work on organization-wide compensation studies, Mr. Gardiner is experienced in conducting executive compensation analyses.

Mr. Gardiner earned a B.A. in Business Management from the University of Missouri-Columbia.

Gaby Davidson

Senior Compensation Consultant

University of Missouri-Columbia, B.B.A Finance

Ms. Davidson is a Consultant with CBIZ Compensation Consulting in the St. Louis office. Since joining CBIZ, her experience includes market benchmarking analysis across a wide scope of industries, positions, and types of organizations.

Ms. Davidson earned a BBA in Finance from the University of Missouri.

Cece Golinvaux

Compensation Consultant

Saint Louis University, Richard A. Chaifetz School of Business, Master of Business Administration
Saint Louis University, Bachelor of Science in Criminology and Criminal Justice

Ms. Golinvaux is a Consultant with CBIZ Compensation Consulting in the St. Louis office. Since joining CBIZ, her experience includes conducting research and data analysis to help design and implement strategic compensation and total rewards programs.

Prior to this role, held positions in data analytics and consulting, offering support to various organizations in enhancing their operational and strategic decision-making. Experience includes working in nonprofit sectors, focusing on data analysis and community support initiatives.

Elise Fuller

Compensation Consultant

University of Missouri, Bachelor of Business Administration, emphasis in Management
University of Missouri, Bachelor of Business Administration, emphasis in Marketing

Ms. Fuller is a Consultant with CBIZ Compensation Consulting in the St. Louis office, with a focus on advising organizations in compensation planning and strategy to align with business goals and market trends.

Before joining CBIZ, experience included various HR roles, where responsibilities ranged from managing daily operations to supporting HR compliance and employee relations functions. Earlier positions supported HR administration, enhancing skills in people management, compliance, and operational coordination.

Professional achievements include awards like the President's Volunteer Service Award (Gold and Bronze) and honors on the University of Missouri Dean's List, underscoring a dedication to excellence and community service. Outside of work, interests include volunteering and exploring personal development through community service initiatives.

Part C: Project Approach and Work Plan

It is our understanding that the City is seeking a qualified compensation consulting firm to conduct a classification and compensation study that reflects a comprehensive approach to building and maintaining a fair, competitive, and sustainable compensation system that supports both organizational effectiveness and employee engagement.

The City seeks to attract and retain a highly qualified and diverse workforce by ensuring that pay and benefits are competitive with the external labor market and aligned with the City's strategic goals and fiscal capacity. Equally important is the goal of internal equity—developing a logical and transparent classification structure that groups positions based on similarities in scope, complexity, responsibility, and required qualifications.

The City also aims to establish a clear, defensible pay structure that is easy for employees and management to understand, fostering trust and consistency in compensation administration. Additionally, the project will support career development by defining clear pathways for advancement and meaningful pay progression. Ensuring compliance with all relevant employment laws, including the Fair Labor Standards Act (FLSA), Equal Pay Act, and Americans with Disabilities Act (ADA), is essential to maintaining legal integrity and fairness across the organization.

Finally, the City recognizes the importance of sustainability and seeks a fiscally responsible implementation strategy and ongoing maintenance plan that will enable City staff to effectively manage and update the system over time, ensuring continued relevance in a dynamic labor market.

In an effort to meet the City's needs, CBIZ proposes to conduct the project steps detailed on the following pages.

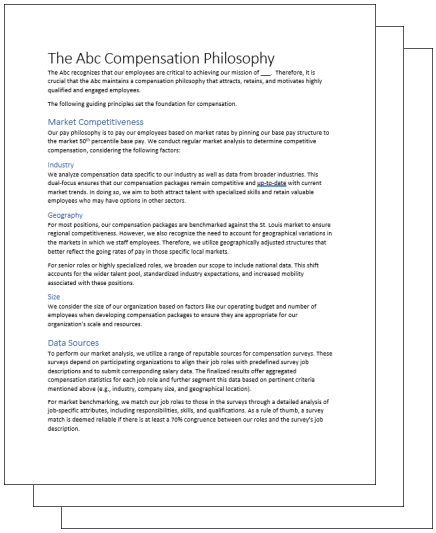
Phase I: Project Launch

Step 1 – Kick-off and Planning Discussion

Objective: To discuss foundational aspects of the project including compensation philosophy, market placement strategy, and project goals.

- Conduct a virtual meeting with the internal project team to discuss foundational aspects of the project, such as:
  - The compensation philosophy, including defining the market placement strategy and competitive labor market(s) in terms of geography, industry, and size of organization.
  - Differentiation or segmentation whereby segments of the workforce may warrant a separate compensation philosophy or special needs.
  - Current program strengths, areas for improvement, key challenges, and culture.
  - The ideal competitive positioning of various rewards components, such as base salary, total cash compensation, and benefits.
  - The organizational structure, hierarchy of jobs, and ability for employees to advance through the organization.

Image 1


The Abc Compensation Philosophy

The Abc recognizes that our employees are critical to achieving our mission of ___. Therefore, it is crucial that the Abc maintains a compensation philosophy that attracts, retains, and motivates highly qualified and engaged employees.

The following guiding principles set the foundation for compensation.

Market Competitiveness

Our pay philosophy is to pay our employees based on market rates by pinning our base pay structure to the market 50th percentile base pay. We conduct regular market analysis to determine competitive compensation, considering the following factors:

Industry

We analyze compensation data specific to our industry as well as data from broader industries. This dual-focus ensures that our compensation packages remain competitive and up-to-date with current market trends. In doing so, we aim to both attract talent with specialized skills and retain valuable employees who may have options in other sectors.

Geography

For most positions, our compensation packages are benchmarked against the St. Louis market to ensure regional competitiveness. However, we also recognize the need to account for geographical variations in the markets in which we staff employees. Therefore, we utilize geographically adjusted structures that better reflect the going rates of pay in those specific local markets.

For senior roles or highly specialized roles, we broaden our scope to include national data. This shift accounts for the wider talent pool, standardized industry expectations, and increased mobility associated with these positions.

Size

We consider the size of our organization based on factors like our operating budget and number of employees when developing compensation packages to ensure they are appropriate for our organization's scale and resources.

Data Sources

To perform our market analysis, we utilize a range of reputable sources for compensation surveys. These surveys depend on participating organizations to align their job roles with predefined survey job descriptions and to submit corresponding salary data. The finalized results offer aggregated compensation statistics for each job role and further segment this data based on pertinent criteria mentioned above (e.g., industry, company size, and geographical location).

For market benchmarking, we match our job roles to those in the surveys through a detailed analysis of job-specific attributes, including responsibilities, skills, and qualifications. As a rule of thumb, a survey match is deemed reliable if there is at least a 70% congruence between our roles and the survey's job description.

  - The project goals and schedule, including key dates with employees, leadership, and governing bodies.
- Provide a draft compensation philosophy document (see Image 1) following the meeting to ensure that CBIZ and the City agree regarding the key factors that will drive subsequent analysis.

Step 2 – Data Collection and Reconciliation

Objective: To collect and assess necessary data for project accuracy and to reflect current job titles and supporting documentation.

- Issue a data request outlining the specific items required for the project. This will encompass organization scoping metrics, employee census information, current pay practices and programs, existing job documentation, organizational charts, and internal equity considerations.
  - The data request is included for reference as Appendix A.
- Collect data that represents a specific point-in-time snapshot of the organization.
  - Ongoing updates or refreshes of employee data can be facilitated independently using the Implementation File, which is described later.
- Thoroughly review the collected data to verify completeness and identify any discrepancies. This step is crucial to ensure the new compensation plan is based on current and accurate job titles and supporting documentation for each employee included in the plan.
- Cross-check submitted job descriptions with employee job titles. Confirm that a relevant job description exists for each employee and that all job descriptions are current and valid.

Step 3 – Communication Plan

Objective: To provide effective communication messages to introduce the project and provide critical change management communications key stakeholders.

- Provide draft communication documents to announce the project to key stakeholders including City leadership, department heads, supervisors, and all employees. Assumes up to four (4) separate communication messages developed. The draft will be provided in Microsoft Word.
- The City will finalize and deliver the communications.

Phase II: Evaluate Job Documentation

Step 4 – Position Analysis Questionnaire

Objective: To collect comprehensive information about each role, enabling participation in the process and ensuring alignment with job responsibilities.

- Evaluate the need to have employees complete a web-based position analysis questionnaire (PAQ)
- The PAQ may by valuable for the following reasons:
  - The PAQ is designed to collect comprehensive and current information about each role covered in the scope of the analysis, ensuring our compensation evaluation aligns with actual job responsibilities and requirements.
  - Provide employees with an opportunity to participate in the process and communicate directly with the consultants.
- The following steps elaborate on the PAQ process:
  - Provide a draft PAQ for review and opportunity to propose edits.

- Provide draft communications to announce the PAQ process and expectations to supervisors and employees.
- Launch a web-based PAQ directly to employee email addresses. Paper-based PAQs are available as well if needed for segments of the employee population.
- Completed PAQs are electronically routed to supervisors for review and comment. Supervisors cannot change the employee submissions but will have the opportunity to provide clarifying comments and other helpful information.
- The timeframe is expected to last three weeks, which in our experience blends the right amount of urgency to complete with time to do so thoughtfully.
- Completed PAQs can also be used to support overtime classification eligibility under the Fair Labor Standard Act (FLSA) and identify essential duties helpful to Americans with Disabilities Act (ADA) compliance.

Step 5– Conduct Employee Interviews

Objective: To collect comprehensive information about each role and supplement data gathered through the PAQ process.

- Identify employees for interview.
  - As part of our PAQ process, we assess and score the completeness of each employee's PAQ. CBIZ would recommend interviews for any job in which there the highest completion score submitted was less than 60%.
  - CBIZ proposes that no more than 30% of the jobs will be selected for interview.
- Partner with the City to schedule interview sessions.
- Lead interview sessions, either with individuals or a collection of employees for multi-incumbent positions, with a representative sample of employees selected by the City to obtain further understanding of job duties.
- Confirm the accuracy of job description content and discusses the appropriateness of the current job family categories, job title hierarchy, and structure classification

Step 6 – Job Architecture Framework

Objective: To design and implement a comprehensive Job Architecture Framework that aligns job roles, titles, and levels with the organization's strategic goals, enhances internal equity, and ensures market competitiveness.

- Conduct planning meetings with the project team to discuss initial views and goals of job architecture.
- Evaluate current data and propose an initial framework for the following design components:
  - Job families that are broad occupational categories that group closely related jobs to aid organizations in peer comparisons and career paths/progression.
  - Job categories or "career streams" (e.g., management, professional, business support) that are broad categories to be able to more easily compare across the job families and functions where there are peers within other disciplines that should be considered for various things such as pay equity or career paths.
  - Career levels (e.g., entry, intermediate, advanced) that are consistent definitions across the organization on select compensable factors which describe the level of scope, impact, problem solving, complexity, collaboration, and management along with the typical profile of education and experience required or preferred to be fully competent in a position.
- Solicit feedback on the initial design.

- Build out career level details and matrix.
- Slot current roles into the career level structure based on a review of job content.
- Seek feedback regarding job and employee slotting.
- Discuss how job architecture can be used to support HR related processes, such as the drafting and classification of new positions.

Step 7 – Determine FLSA Status

Objective: To review job roles against FLSA exemption tests and document appropriate classifications for compliance

- Identify jobs for which CBIZ should conduct the Fair Labor Standards Act (FLSA) overtime classification review.
- Assess positions against the federal FLSA exemption tests (Executive, Administrative, Professional, Computer Professional, Sales and Highly Compensated) to determine the appropriate FLSA overtime classification based upon the duties and responsibilities provided in the job descriptions and position analysis questionnaires.
- Document recommendations in a report listing the appropriate classification.
  - For exempt-classified jobs, the report will list the applicable exemption and a brief supporting rationale.
  - For nonexempt classified jobs, the report will provide a brief explanation as to why no exemptions were met.
- This report will provide backup for the exemption decisions in order to ease any subsequent Department of Labor or other government entity audits.
- CBIZ recommends that the City's legal team review our findings for final validation.

Step 8 – Draft New Job Descriptions

Objective: To standardize job descriptions accurately based on revised job content.

- Review the existing format (if applicable) and discuss opportunities for refinement.
- Discuss with the City the validity of current job descriptions and the degree to which they should serve as a guide for revisions.
- The following sections may be included in the new job descriptions:
  - Job/Position Summary
  - Essential Functions/Duties/Responsibilities
  - Qualifications/Education and Experience
  - Knowledge, Skills & Abilities
  - Supervisory Responsibility
  - Work Environment/Working Conditions
  - Physical Work Requirements
- Utilize the job content collected in prior steps to draft updated job descriptions for each position covered in the scope of the project.
  - Based on the recommended reclassifications, job titles will be revised or consolidated. Additionally, job titles will be separated or increased to better reflect levels within the organizational hierarchy.

  - Physical Work Requirements and Working Conditions will be determined based on information provided in the PAQ and interviews, as well as a review of job duties and responsibilities. Jobs will be assigned a standard profile to ensure consistency across jobs.
- Identify jobs for which information is not available or insufficient to draft a new job description and discuss options for drafting such job descriptions.
- Draft job descriptions in a standardized format that will:
  - Assist with the collaborative process of identifying reasonable accommodations under the Americans with Disabilities Act (ADA).
  - Contain supporting and relevant information to determine overtime exemption status under the Fair Labor Standards Act (FLSA).
- Deliver draft job descriptions and solicit feedback for revisions (assumes one set of revisions).
- Provide final job descriptions in an electronic format and provide a job description template to be used in the development of future job descriptions.

Phase III: Market Research

Step 9 – Custom Compensation and Benefits Survey

Objective: To collect compensation and benefits data from comparable peer entities.

- Conduct a survey of compensation and benefits practices in which a group of pre-approved peer municipalities and government entities will be invited to participate and provide data.
- Collaborate to determine defensible, comparable entities against which the City should be compared. A maximum of twenty (20) entities is anticipated for selection.
- Peer organizations will be more inclined to respond if the survey is shorter and more straightforward. Therefore, while all or nearly all jobs are expected to be included in the survey, the exact number of benchmark jobs will be jointly agreed upon by CBIZ and the City.
- Distribute the survey instrument to the selected organizations for gathering salary and benefit information pertaining to the chosen benchmark jobs.
- Peers will be instructed to match their jobs to the predefined survey roles by comparing job responsibilities, rather than just job titles.
  - Utilizing this method ensures more accurate job matching compared to relying solely on publicly available or sunshine-requested data.
- Solicit participation from the peer organizations throughout the survey process to encourage and secure participation.
- Review the survey submissions to validate data and identify gaps; initiate follow-up discussions for clarification, as necessary.
- Compile a comprehensive yet straightforward summary, which will be shared with both the City and the survey participants. Individual participant data will remain confidential to safeguard anonymity, boost participation rates, and avoid any perception of anti-competitive practices.

Step 10 – External Market Analysis

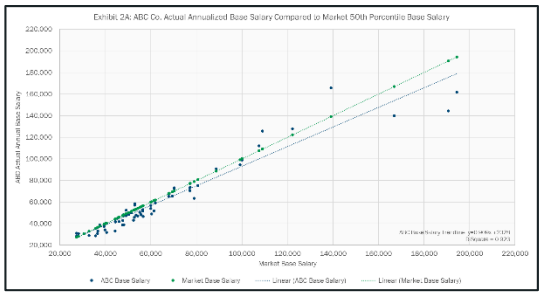
Objective: To conduct a comprehensive compensation benchmarking analysis, ensuring industry comparisons are relevant and accurately tailored to the specific roles and responsibilities of each job.

- Conduct published survey benchmarking analysis to collect and document competitive base salary and total cash compensation (base salary plus annual incentive) data for all of the jobs included in the scope of the proposal.
- In addition to data collected from the custom survey, utilize our proprietary database that automatically compiles data from numerous published surveys to identify appropriate supplemental data for the analysis.
- Evaluate and incorporate any surveys to which the City subscribes into the analysis.
- Analysis will be based on comparable organizations as discussed in the planning discussion.
  - The three most important labor market characteristics are the size of the organization, geographic scope, and industries from which an organization recruits talent.
  - CBIZ will determine each characteristic as it relates to the City before reviewing survey sources and conducting the market analysis.
- Match jobs to surveys based on the actual skills, duties, and responsibilities as opposed to merely matching jobs based on title.
- Document market pricing benchmarking results at the 25th, 50th, and 75th percentiles (see Image 2), as well as other percentiles (e.g., 65th percentile) if relevant to market placement philosophy.

Image 2

ABC Co.
Preliminary Compensation Study Results
Exhibit 1 - Market Summary
Data Effective July 1, 2023

CBIZ Code	Current Job Title	Market Base Salary Percentiles 25th	50th	75th	Proposed Pay Grade	Market Total Cash Compensation Percentiles 25th	50th	75th
105	Chief Financial Officer	174,500	194,454	235,761	16	209,053	239,798	302,744
157	Senior Vice President, Operations	171,079	190,642	231,139	16	204,954	235,097	296,808
163	Vice President, Development	150,806	166,940	189,717	15	198,027	227,327	272,798
110	Director, Planning & Systems	124,981	139,142	158,147	14	186,874	207,839	237,970
108	Controller	106,330	122,262	142,751	13	113,655	132,094	158,300
114	Facilities Engineer	98,911	109,021	117,513	12	103,856	114,473	123,389
114	Facilities Engineer	98,911	109,021	117,513	12	103,856	114,473	123,389
164	Vice President, Education	89,096	107,569	125,929	12	121,064	143,737	175,067
154	Senior Manager, Human Resources	92,614	100,093	110,219	11	98,160	106,167	116,977
130	Manager, Compensation & Benefits	91,629	99,119	109,170	11	96,939	104,934	115,634



Step 11 – Benefits and Total Rewards

Objective: To benchmark benefits costs and key design elements against market data and calculate total compensation for market alignment.

- Analyze the City's benefits costs currently in place to the market-competitive published survey data.
  - For fixed-cost benefits, such as medical and medically related benefits (e.g., medical, dental, vision, STD, LTD, and life insurance), compare data to the market and value the total as an average cost per employee.
  - For variable-cost benefits, such as retirement and time-off benefits, compare plans and capture an employee cost as a percentage of salary.
  - With this valuation formula, evaluate employee benefit levels to market levels.
- Identify areas where the City's benefits vary from market.
- Calculate total compensation by adding the employee benefits valuation to total cash compensation and compare to market total compensation.

Phase IV: Design Preliminary Compensation System

Step 12 – Pay Structure(s)

Objective: To develop market-based pay structures ensuring external competitiveness, internal equity, and rational pay decisions.

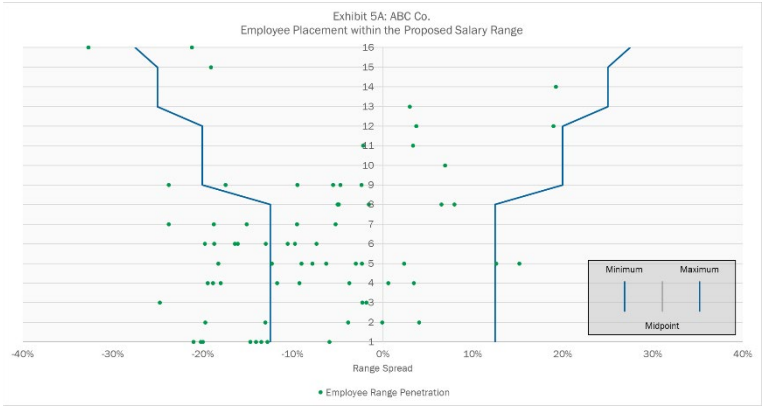
- Develop new market-based pay plans to simplify compensation administration and to help the City maintain its competitive position, or update the salary ranges currently in place.
- Pay structures will consist of pay grades, each with a salary range minimum, midpoint, and maximum.
  - The salary range minimum will approximate competitive entry level pay.
  - The salary range midpoint will approximate the target market competitive placement (e.g., market 50% percentile).
  - The salary range maximum is a tool of management control that establishes a cap on pay. This approximates the upper range of market competitive pay and encourages employees to expand their skills and seek promotion opportunities.
- Discuss the need for, and pros and cons of, creating separate salary structures for different segments of the workforce.
- Evaluate the design characteristics of the structure, including the number of grades, range spreads, and midpoint differentials to align with internal job architecture and scope of positions.
- Evaluate the means by which employees progress through the pay structure, such as performance based, open ranges, or step based.
- Finalize the draft market-competitive pay structures considering the number of jobs, career levels, compensation philosophy, and potential for future growth.
- Slot jobs into the pay structure(s) based upon the market-competitive compensation.

Step 13 – Implementation Analysis

Objective: To compare actual compensation practices with market data and assess financial impact of proposed changes.

- Compare actual compensation practices to the market-competitive data collected in the market analysis step and the pay structures designed previously (see Image 3).

Image 3



- Assess the financial impact of implementing the recommended compensation practices.
- Identify any employees paid below the proposed pay grade minimums or above the proposed pay range maximums.

- Document the results on a job-by-job and employee-by-employee basis with specific pay recommendations.

Step 14 – Pay Compression Analysis

Objective: To address current pay compression issues and create space to avoid future pay compression.

- Pay compression exists primarily in two scenarios:
  - When employees with less tenure are paid a similar rate or higher compared to peers with greater tenure.
  - When subordinates are paid at a rate too near that of their supervisor.
- Analyze peer-to-peer compression by designing a compression-based pay model to identify inequitable pay.
  - Pay compression is identified by comparing current pay to a theoretical salary-range placement based on job experience and performance.
  - Should current pay lag the calculated range placement, an increase is recommended.
  - The tool will be interactive to allow for modeling of different scenarios that can back into a budget number and can be set to implement the changes over multiple years.
- Analyze subordinate-to-supervisor compression by analyzing pay spreads and identifying areas for further evaluation. In some cases, such as in dual career path job families, compression may be identified but it may not be an issue.

Phase V: Deliver Results

Step 15 – Preliminary Results Meeting

Objective: To review draft results of the full project deliverables and begin the process of gathering feedback.

- Complete an internal project team review of the draft analysis as a final quality check.
- Conduct a virtual meeting to review the draft results. Items for review include:
  - Project report and supporting exhibits
    - Job architecture
    - Market pricing results
    - Pay structure design
    - Internal equity of each job
    - Implementation cost analysis
- Sample report and exhibits have been provided.
- Discuss the need for compression-based pay adjustments to alleviate internal pay compression and/or improve the overall pay competitiveness to the market.
- Provide copies of project report and supporting exhibits.

Step 16 – Incorporate the City's Feedback

Objective: To gather feedback on internal equity and salary structure adjustments for optimal implementation strategy.

- Gather internal equity feedback regarding adjustments needed to correct for internal comparisons between jobs.
- Identify salary structure adjustments needed to address cultural considerations.
- Discuss and determine the optimal implementation strategy that considers cost, culture, timeline, and other issues.

- All changes to employee data should be in writing so that CBIZ can proof data entry to make sure the City's reports are accurate.
- The City will have the opportunity to make one set of changes.

Step 17 – Implementation File

Objective: To provide a comprehensive file for managing employee data changes and modeling implementation costs.

- Provide a comprehensive Implementation File that allows the City to process employee data changes and model implementation costs.
- Key Features of the Implementation File:
  - Employee Data Refresh: Facilitate the updating and management of employee data to align with new compensation structures.
  - Job Editing: Enable modifications for new positions, reclassifications, and slotting to reflect organizational changes.
  - Cost Modeling: Incorporate salary structure edits and compression model refinement for accurate financial planning.
  - Live Data Visualization: Generate dynamic tables and charts that reflect real-time changes, providing a clear overview of the compensation landscape post-implementation.
- The Implementation File is intended as a strategic tool exclusively for the initial implementation phase. It is designed to assist in the point-in-time transition to the new compensation model. It is important to note that CBIZ's role does not include ongoing maintenance or support of the file following the completion of the project.

Step 18 – Present Final Results

Objective: To provide a comprehensive presentation of the final project results, ensuring transparency to stakeholders.

- Work through feedback requests and issue the final project report.
- If needed, prepare and present summarized results to a leadership team, employees, and/or City Council.
  - Prepare a draft presentation summarizing the scope of the project, methodology, findings, and recommendation for the project team review and feedback.
  - Present the approved presentation onsite to the respective audience and address any questions.

Phase VI: Post-Implementation Support

Step 19 – Salary Administration Guide

Objective: To update and provide a guide for maintaining the compensation plan.

- Equip the City with a salary administration guide that provides direction for maintaining the compensation plan.
- Topics may include:
  - annual compensation planning
  - pay increase recommendations
  - hiring pay
  - promotions
  - demotions

- job classification/reclassification
- assigning new jobs to the pay structure
- policy exceptions
- approvals and notifications

Step 20 – Program Training

Objective: To train staff on compensation plan implementation and ongoing maintenance.

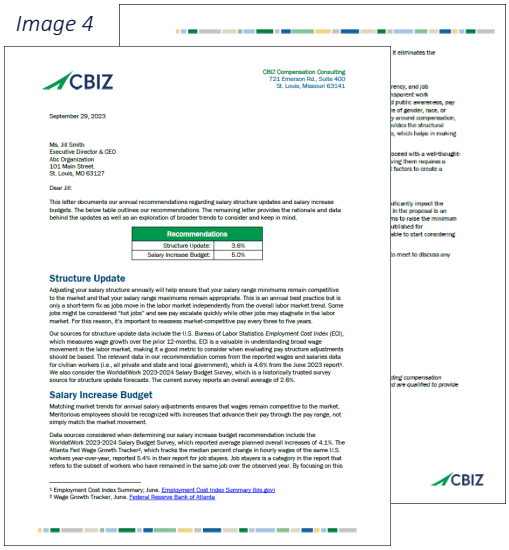
- Conduct a training conversation with key staff to ensure the successful implementation and ongoing maintenance of the compensation plan.
  - Train staff on the compensation project methodology, labor markets, and design features.
  - Teach staff about system implementation and communications techniques, including sample communications for staff.
- Review the salary administration guide and explore examples with staff to ensure successful administration going forward.
- Ensure that staff understand the salary structure and annual adjustment process by reviewing the structure update tool and sample annual letter (described in Ongoing Services below).
- Provide a job evaluation worksheet for the City to slot new or modified positions. The worksheet will evaluate factors such as market data and internal equity, based on compensation philosophy.
- Answer questions to ensure staff have the knowledge necessary to implement and maintain the compensation system.

Annual Salary Planning Letter

Objective: To offer recommendations for ongoing compensation changes and adjustments that maintain market competitiveness.

- Provide the City with an annual letter of salary trend market intelligence for up to five years. The letter will assist with the following:
  - Share trends for what other organizations are forecasting for their annual salary increase process. This will assist the City with benchmarking increase budgets to the market.
  - Share trends for what other organizations are forecasting for annual salary structure adjustments. This will assist the City with annual structure updates that will ensure salary range minimums remain competitive and that salary range maximums remain appropriate.
- No additional fees will be charged for the annual salary trend market intelligence letter.

Image 4



CBIZ

CBIZ Compensation Consulting
721 Emerson Rd., Suite 400
St. Louis, Missouri 63141

September 29, 2023

Ms. Jill Smith
Executive Director & CEO
Abc Organization
101 Main Street
St. Louis, MO 63127

Dear Jill:

This letter documents our annual recommendations regarding salary structure updates and salary increase budgets. The below table outlines our recommendations. The remaining letter provides the rationale and data behind the updates as well as an exploration of broader trends to consider and keep in mind.

Recommendations	
Structure Update:	3.6%
Salary Increase Budget:	5.0%

Structure Update

Adjusting your salary structure annually will help ensure that your salary range minimums remain competitive to the market and that your salary range maximums remain appropriate. This is an annual best practice but is only a short-term fix as jobs move in the labor market independently from the overall labor market trend. Some jobs might be considered "hot jobs" and see pay escalate quickly while other jobs may stagnate in the labor market. For this reason, it's important to reassess market-competitive pay every three to five years.

Our sources for structure update data include the U.S. Bureau of Labor Statistics *Employment Cost Index* (ECI), which measures wage growth over the prior 12-months. ECI is a valuable in understanding broad wage movement in the labor market, making it a good metric to consider when evaluating pay structure adjustments should be based. The relevant data in our recommendation comes from the reported wages and salaries data for civilian workers (i.e., all private and state and local government), which is 4.6% from the June 2023 report[1]. We also consider the WorldatWork 2023-2024 Salary Budget Survey, which is a historically trusted survey source for structure update forecasts. The current survey reports an overall average of 2.6%.

Salary Increase Budget

Matching market trends for annual salary adjustments ensures that wages remain competitive to the market. Meritorious employees should be recognized with increases that advance their pay through the pay range, not simply match the market movement.

Data sources considered when determining our salary increase budget recommendation include the WorldatWork 2023-2024 Salary Budget Survey, which reported average planned overall increases of 4.1%. The Atlanta Fed Wage Growth Tracker‡, which tracks the median percent change in hourly wages of the same U.S. workers year-over-year, reported 5.4% in their report for job stayers. Job stayers is a category in the report that refers to the subset of workers who have remained in the same job over the observed year. By focusing on this

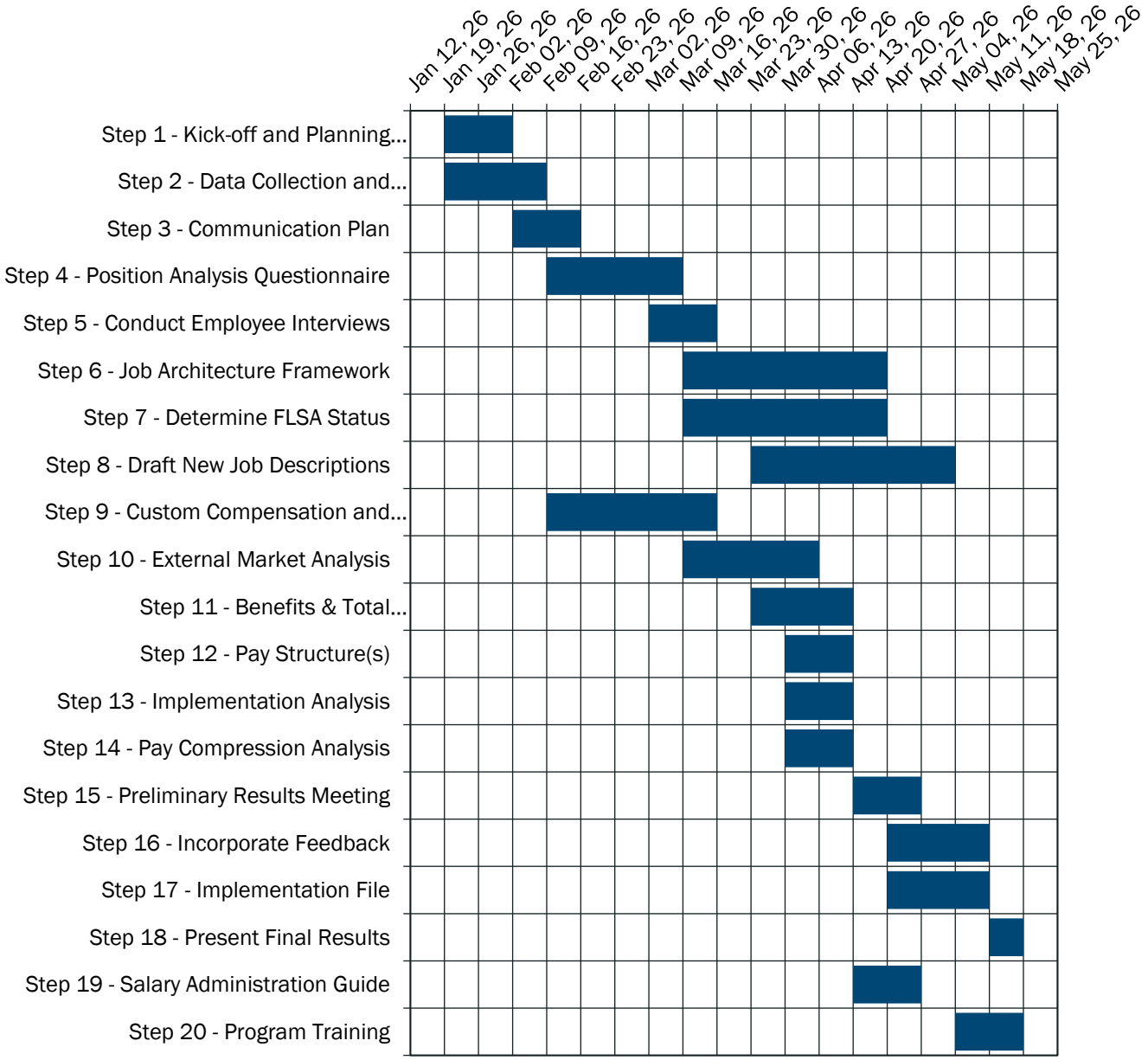
[1] Employment Cost Index Summary; June. Employment Cost Index Summary (bls.gov)
‡ Wage Growth Tracker, June. Federal Reserve Bank of Atlanta

CBIZ

Timeline

CBIZ expects the compensation and classification study to last approximately seventeen (17) weeks, such that final project results should be delivered no later than May 18, 2026, assuming a timely project start date. The proposed project schedule below is highly dependent upon the timely receipt of requested data from the City.

The Data Request in the Appendix specifies the items needed to conduct the analysis.



Annual Salary Planning provided for five years at no additional charge

Reference 1:

Client Name:	City of Republic, MO
Contact Person & Title:	Rachel Reich-Graef, HR Manager
Phone:	(417) 732-3104
Email:	rreich@republicmo.com
Brief Description of Project:	CBIZ completed an organization-wide compensation and benefits study for this client. The study included a comprehensive custom compensation survey of peer organizations, analyzing market competitive pay for all jobs at the organization, evaluation of market competitive benefits and total rewards, designing a new salary structure including police and fire structures, implementation of analysis, compression analysis, and revising compensation administration policies.

Reference 2:

Client Name:	City of Nixa, MO
Contact Person & Title:	Amanda Hunsucker, Director of HR
Phone:	(417) 725-3785
Email:	ahunsucker@nixa.com
Brief Description of Project:	CBIZ completed an organization-wide compensation and benefits study for this client. The study included a comprehensive custom compensation survey of peer organizations, analyzing market competitive pay for all jobs at the organization, evaluation of market competitive benefits and total rewards, designing a new salary structure, implementation of analysis, compression analysis, revising compensation administration policies, and developing job descriptions.

Reference 3:

Client Name:	Johnson County, Kansas Government
Contact Person & Title:	Kayla Holloway, HR Director
Phone:	(913) 715-1423
Email:	Kayla.Holloway@jocogov.org
Brief Description of Project:	CBIZ is conducted an organization-wide compensation study. The study included benchmarking market competitive compensation, designing a new salary structure, evaluating competitive salaries for all employees, presentations to the board, and overall recommendations.

Additional Information

Disclosures

CBIZ's compensation professionals assert that they will not be acting as a member of management or making management decisions or providing the primary basis for management to make decisions that are significant to the subject matter under audit. Other factors that should be considered in making decisions include, but are not limited to, employee performance, tenure, and experience as well as economic and organizational influences.

You agree that CBIZ may use descriptive information about the City in our internal client database (e.g., the number of your employees, or the size of your revenue) so we can identify other business services or products that might be useful to you. We do not sell this information to anyone, and you will not be contacted by anyone other than us to determine if you have any interest in receiving our other services or products.

Appendix A: Data Request

- Employee census: The following data fields are extremely important and should be provided for each employee included in the scope of the study. An Excel template has been provided for your convenience.
  - Unique employee identification number (NOT Social Security Number)
  - Employee name
  - Job title
  - Job code (if available)
  - Date of hire
  - Date of service within the current title
  - Department name
  - Job family (if available)
  - Pay period (i.e., monthly, semi-monthly, bi-weekly, weekly, etc.)
  - Standard hours worked per pay period (to calculate full-time equivalent)
  - Exempt/non-exempt status under the Fair Labor Standards Act (FLSA)
  - Current Salary (annual or hourly)
  - Current salary grade/range (if available/applicable; if salary grade is provided by employee, salary ranges by grade may be provided as a separate Excel file)
  - Most recent performance score (if available)
  - Employee email address (for the position analysis questionnaire process)
  - Supervisor email address (for the position analysis questionnaire process)
  - Supervisor name
  - Supervisor employee identification number
  - Benefits information for each employee:
    - Type of health insurance plan selected (PPO, High Deductible, HMO, etc.)
    - Level of health insurance coverage selected (single, family, etc.)
    - Level of dental insurance coverage selected (single, family, etc.)
    - Level of vision insurance coverage selected (single, family, etc.)
- Additional Benefits Details:
  - Monthly employer-paid health insurance premium
  - Monthly employee-paid health insurance premium
  - Monthly employer-paid premium for dental, short-term disability, long-term disability, and life insurance (listed separately; monthly premium invoices may be provided)
  - Other employer-paid monthly benefits costs listed as separate line items. (employee assistance program, health savings account contributions, etc.; monthly invoices may be provided)
  - Employer retirement plan types offered to each employee group included in the scope of the study (i.e., defined benefit/pension, defined contribution) and matching/contribution formula
  - Paid time off policies/schedules for each employee group included in the scope of the study
- Current or most recent fiscal year revenue/budget
- Copies of job descriptions
- Any additional salary structure(s) information such as the number of salary grades, minimum, maximum and steps for each grade and which job titles slot into which structures and grades
- Organizational charts
- Current compensation philosophy documentation (if available)
- A copy of past compensation study results

- Human Resource policies and procedures related to compensation and benefits administration
- Copies of any salary surveys which you currently use (original hard copies are acceptable and will be returned at the end of the project)

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	CBIZ Benefits & Insurance Services, Inc
Mailing Address:	700 West 47th Street, Suite 1100 Kansas City, Missouri 64112
Website:	https://www.cbiz.com/services/advisory/human-capital-management/compensation-consulting
Year Firm Established:	1987
Office Location Performing the Work:	721 Emerson Road, Suite 400 St. Louis, MO 63141
Primary Contact Person:	Ryan Blackwell
Title:	Director, Compensation Consulting
Phone:	(314) 692-5801
Email:	rblackwell@CBIZ.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [ ] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [ ] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

the exterior with: **"SEALED COST PROPOSAL – SALARY STUDY"**.

Technical Proposal Contents:

- [ ] **Part A: Transmittal Letter:** A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [ ] **Part B: Firm Experience and Qualifications:**
  - [ ] Firm history, size, and ownership structure.
  - [ ] Detailed experience with public sector classification and compensation studies.
  - [ ] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [ ] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [ ] **Part C: Project Approach and Work Plan:**
  - [ ] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [ ] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [ ] A sample of a final report from a previous, similar municipal project.
  - [ ] A sample of a job description from a previous, similar municipal project.
- [ ] **Part D: References:**
  - [ ] At least three (3) references from public sector clients (use Section 3 of this form).
- [ ] **Part F: Acknowledgement Form (Section 4 of this form):** Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [ ] All-inclusive, "not-to-exceed" total project cost.
- [ ] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [ ] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Provide at least three (3) references from public sector clients for whom similar work was completed within the last five years.

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDYList Addenda Numbers received:
   Addendum #1
   Addendum #2
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature: Nancy M. Mellard	
Printed Name: Nancy M. Mellard	
Title: Executive Vice President CBIZ Benefits & Insurance Services, Inc.	
Date: 11/13/2025	

Evergreen Solutions, LLC

A Proposal to Conduct a

CLASSIFICATION AND COMPENSATION STUDY

FOR THE CITY OF INDEPENDENCE, IA

ORIGINAL

November 20, 2025

A Proposal to Conduct a Classification and Compensation Study for the City of Independence, IA

Submitted to:

Matthew R. Schmitz, City Manager
City of Independence
331 1st Street East
Independence, Iowa 50644

Submitted by:

Evergreen Solutions, LLC
2528 Barrington Circle, Unit 201
Tallahassee, Florida 32308
(850) 383-0111 (ph) / (850) 383-1511 (fax)

November 20, 2025

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E. Sealed Cost Proposal (UNDER SEPARATE COVER)

APPENDIX: SAMPLE FINAL REPORT

Section A
Letter of Transmittal

Evergreen Solutions, LLC
2528 Barrington Circle • Unit #201 • Tallahassee, Florida 32308
850.383.0111 • fax 850.383.1511

Section A – Letter of Transmittal

November 17, 2025

Matthew R. Schmitz
City Manager
City of Independence
331 1st Street East
Independence, Iowa 50644

Dear Mr. Schmitz:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct Classification and Compensation Study for the City of Independence. Our response is based on our review of your Request for Proposal, our experience in working with hundreds of local governments and other public sector organizations throughout the country, and our knowledge of best practices in local government human resources management. **Evergreen is well qualified to provide the services being requested by the City of Independence as we have provided similar services to more than 1,500 local governments and other public sector organizations throughout the country.**

Evergreen was formed in 2004 to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 47 states.

Evergreen has worked with, or is currently on contract to work with, the following local governments in providing work similar in scope to the services being requested: City of Lee's Summit, MO; City of Fulton, MO; City of Branson, MO; City of Columbia, MO; City of Troy, MO; City of St. Louis, MO; City of Jefferson, MO; City of Dardenne Prairie, MO; Jefferson County, MO; Jackson County, MO; St. Charles County, MO; Jasper County, MO; City of Broken Arrow, OK; City of Hot Springs, AR; City of Salina, KS; City of Leawood, KS; Sedgwick County, KS; Shawnee County, KS; Mahoning County, OH; Blount County, TN; Madison County, TN; City of Morristown, TN; City of Cleveland, TN; City of Murfreesboro, TN; City of Clarksville, TN; City of White House, TN; Town of Addison, TX; City of Portland, TX; City of Del Rio, TX; City of Lakeway, TX; City of Fair Oaks Ranch, TX; City of Austin, TX; City of Montgomery, TX; City of Aransas Pass, TX; City of Coppell, TX; City of Deer Park, TX; City of Alpine, TX; City of La Porte, TX; City of Port Arthur, TX; City of Seguin, TX; City of Buda, TX; City of Missouri City, TX; City of Amarillo, TX; City of Beaumont, TX; City of Denton, TX; City of Odessa, TX; City of Cleburne, TX; City of Harlingen, TX; City of Kingsville, TX; City of Texas City, TX; City of Fredericksburg, TX; Cit of Wharton, TX; Fort Bend County, TX; Matagorda County, TX; Taylor County, TX; Denton County, TX; Aransas County, TX; Town of Prosper, TX; City of Winchester, KY: City of Urbana, IL; City of Moline, IL; McLean County, IL; Genesee County, MI; City of Kalamazoo, MI; City of Minneapolis, MN; City of Pittsburgh, PA; County of Montgomery, PA; Town of Bridgewater, MA; City of Cambridge, MA; Town of Colchester, VT; Genesee County, NY; City of Baltimore, MD; City of Hyattsville, MD; City of Takoma Park, MD; City of Annapolis, MD; Frederick County, MD; Prince George's County, MD; Talbot County, MD; Allegany County, MD; Washington County, MD; Town of Plainville, CT; City of Milford, DE; City of Seaford, DE; City of Newport News, VA; City of Fredericksburg, VA; City of Norfolk, VA; City of Covington, VA; City of Hopewell, VA: City of Williamsburg, VA; City of Falls Church, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Loudoun County, VA; Spotsylvania County, VA; Northumberland County, VA; Bedford County, VA; Shenandoah County, VA; Chesterfield County, VA; King George County, VA; Alleghany County, VA; Union County, NC; Gaston County, NC; Dare County, NC; Jackson County, NC; Franklin County, NC; Vance County, NC; Harnett County, NC; Haywood County, NC; Buncombe County, NC; City of Raleigh, NC; Town of Chapel Hill, NC; City of Fayetteville, NC; City of High Point, NC; City of Rocky Mount, NC; City of Goldsboro, NC; City of Hendersonville, NC; Town of Clayton, NC; City of Columbia, SC; City of Greenwood, SC; City of Lancaster, SC; City of Conway, SC; City of Myrtle Beach, SC; City of Pickens, SC; City of Mauldin, SC; Dillon County, SC; Charleston County, SC; Dorchester County, SC; Spartanburg County, SC; Town of Hilton Head Island, SC; Town of Kiawah Island, SC; City of Atlanta, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Norcross, GA; City of Garden City, GA; City of Sandersville, GA; City of Stockbridge, GA; City of East Point, GA; City of Riverdale, GA: City of Clarkston, GA; City of Dublin, GA; City of Dunwoody, GA; City of Roswell, GA; City of Dalton, GA; City of Chamblee, GA; City of Savannah, GA; City of Cedartown, GA; City of Kingsland, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Columbus Consolidated Government, GA; DeKalb County, GA; Worth County, GA; Cherokee County, GA; City of Daphne, AL; City of Opelika, AL; City of Hartselle, AL; City of Auburn, AL; City of Foley, AL; Baldwin County, AL;

Chambers County, AL; City of Sarasota, FL; City of Winter Park, FL; City of Orlando, FL; City of Sunrise, FL; City of Hollywood, FL; City of Boca Raton, FL; City of Melbourne, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Suwannee County, FL: Manatee County, FL; Monroe County, FL; City of Boulder City, NV; Ogden City Corporation, UT; City of Manitou Springs, CO; City of Fountain, CO; Grand County, CO; Garfield County, CO; City of Camarillo, CA; City of Long Beach, CA; City of Bell Gardens, CA; City of Sanger, CA; City of Yucaipa, CA; City of Thousand Oaks, CA; City of Fresno, CA; City of Beaumont, CA; City of Moorpark, CA; City of Santa Ana, CA; City of West Hollywood, CA: Calaveras County, CA; Inyo County, CA; City of Flagstaff, AZ; City of Prescott, AZ; City of Page, AZ; Town of Sahuarita, AZ; Town of Prescott Valley, AZ; Yavapai County, AZ; City of Santa Fe, NM; City of Carlsbad, NM; City of Albuquerque, NM; City of Albany, OR; City of Bend, OR; City of Portland, OR; Columbia County, OR; Spokane County, WA; City of Bellingham, WA; City of Ridgefield, WA; and many others. A detailed description of the services provided to some of these clients as they relate to the services being requested can be found in **Section B** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Independence based on our vast understanding of local government human resources, and the fact that we possess the necessary experience and knowledge. Our team has significant expertise in conducting classification and compensation studies for local governments and other public sector organizations, as evidenced in **Section B** of our proposal.

Some of the human resource services Evergreen has focused on include: classification and compensation studies; salary and benefits surveys; workload analyses; staffing studies; performance management studies; HR department reviews; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability. Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management. As a result, our team understands how critical a classification and compensation system is to the overall operation of a proficient and progressive municipality. We have developed helpful methods and tools that assist clients in implementing and maintaining our study recommendations.

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

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, leadership, department heads, and staff need to be involved in every step of the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.

- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web. Further, our web-based ***JobForce Manager*** tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.

- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. We have read your terms and conditions and believe we can work successfully within your requirements. We acknowledge receipts of addendums #1 and #2. All required forms are attached except the reference form which is attached to **Section D** of our proposal.

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

Sincerely,

Jeffrey Ling, PhD, President
Evergreen Solutions, LLC

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	Evergreen Solutions, LLC
Mailing Address:	2528 Barrington Circle, Unit 201 Tallahassee, FL, 32308
Website:	www.consultevergreen.com
Year Firm Established:	2004
Office Location Performing the Work:	2528 Barrington Circle, Unit 201 Tallahassee, FL, 32308
Primary Contact Person:	Jeffrey Ling, PhD
Title:	President
Phone:	(850) 383-0111
Email:	jeff@consultevergreen.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [ ] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [ ] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

the exterior with: **"SEALED COST PROPOSAL – SALARY STUDY"**.

Technical Proposal Contents:

- [ ] **Part A: Transmittal Letter:** A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [ ] **Part B: Firm Experience and Qualifications:**
  - [ ] Firm history, size, and ownership structure.
  - [ ] Detailed experience with public sector classification and compensation studies.
  - [ ] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [ ] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [ ] **Part C: Project Approach and Work Plan:**
  - [ ] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [ ] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [ ] A sample of a final report from a previous, similar municipal project.
  - [ ] A sample of a job description from a previous, similar municipal project.
- [ ] **Part D: References:**
  - [ ] At least three (3) references from public sector clients (use Section 3 of this form).
- [ ] **Part F: Acknowledgement Form (Section 4 of this form):** Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [ ] All-inclusive, "not-to-exceed" total project cost.
- [ ] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [ ] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Provide at least three (3) references from public sector clients for whom similar work was completed within the last five years.

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDYList Addenda Numbers received:
   Evergreen acknowledges receipt of Addendum #1 and Addendum #2.
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	
Printed Name:	Jeffrey Ling, PhD
Title:	President
Date:	11/17/2025

Section B
Firm Experience and Qualifications

B. Firm Experience and Qualifications

Evergreen Solutions, LLC is well qualified to conduct a Classification and Compensation Study for the City of Independence due to our experience in conducting more than 1,500 similar studies for local governments and other public sector organizations across the country. In this section, we provide you with our firm's profile and history; a list of similar studies we have conducted or are currently under contract to conduct; and the qualifications of our proposed project team.

B.1 Firm's Profile and History

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

Evergreen Solutions was formed in 2004 as a limited liability company 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 23 full-time and three part-time employees who work on one of five consultant teams providing a variety of human resource management consulting.

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

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

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

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

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting classification and compensation studies for local governments and other public sector organizations throughout the country;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant 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 B-1** includes a sample list of the local government clients we have worked with, or are currently under contract to work with, in providing work similar in scope to the services being requested.

Exhibit B-1: Sample List of Local Government Clients			
Spokane County, WA	City of Hot Springs, AR	Harford County, MD	Pickens County, SC
City of Ridgefield, WA	City of Leawood, KS	City of Falls Church, VA	York County, SC
City of Washougal, WA	City of Salina, KS	City of Fredericksburg, VA	City of Auburn, AL
City of Bellingham, WA	Sedgwick County, KS	City of Newport News, VA	City of Mobile, AL
City of Albany, OR	Shawnee County, KS	City of Williamsburg, VA	City of Foley, AL
City of Bend, OR	City of St. Louis, MO	City of Norfolk, VA	City of Daphne, AL
City of Portland, OR	City of Lee's Summit, MO	Chesterfield County, VA	City of Madison, AL
Columbia County, OR	City of Columbia, MO	County of Culpeper, VA	City of Northport, AL
City of Palm Springs, CA	City of Dardenne Prairie, MO	County of Northampton, VA	Baldwin County, AL
City of Riverbank, CA	City of Jefferson, MO	County of York, VA	Lee County, AL
City of Fresno, CA	City of Troy, MO	Gloucester County, VA	Chambers County, AL
City of Camarillo, CA	Jackson County, MO	Isle of Wight County, VA	Shelby County, AL
City of Yucaipa, CA	St. Charles County, MO	James City County, VA	City of Alpharetta, GA
City of Long Beach, CA	Jasper County, MO	King George County, VA	City of Atlanta, GA
City of Sacramento, CA	City of Rochester, MN	Loudoun County, VA	City of Brookhaven, GA
City of Thousand Oaks, CA	City of Minneapolis, MN	Montgomery County, VA	City of Chamblee, GA
City of Crescent City, CA	Genesee County, MI	Northumberland County, VA	City of Dalton, GA
City of West Hollywood, CA	City of Urbana, IL	Town of Dumfries, VA	City of Douglasville, GA
City of Santa Ana, CA	City of Moline, IL	Town of Chapel Hill, NC	City of Dunwoody, GA
City of Sacramento, CA	McLean County, IL	City of High Point, NC	City of Fayetteville, GA
Calaveras County, CA	City of Bloomington, IN	City of Goldsboro, NC	City of Garden City, GA
Inyo County, CA	City of Winchester, KY	City of Burlington, NC	City of Jackson, GA
City of Boulder City, NV	Blount County, TN	City of Raleigh, NC	City of Marietta, GA
Ogden City Corporation, UT	Madison County, TN	City of Hendersonville, NC	City of Norcross, GA
City of Flagstaff, AZ	Jefferson County, TN	City of Rocky Mount, NC	City of Roswell, GA
City of Page, AZ	City of Murfreesboro, TN	City of Southport, NC	City of Sandy Springs, GA
City of Prescott, AZ	City of Clarksville, TN	Buncombe County, NC	City of Savannah, GA
Yavapai County, AZ	City of Morristown, TN	Dare County, NC	City of Statesboro, GA
City of Carlsbad, NM	City of White House, TN	Franklin County, NC	City of Stockbridge, GA
City of Santa Fe, NM	City of Cleveland, TN	Ashe County, NC	City of South Fulton, GA
City of Albuquerque, NM	City of Pittsburgh, PA	Guilford County, NC	City of Suwanee, GA
Grand County, CO	County of Montgomery, PA	Onslow County, NC	City of Tybee Island, GA
Garfield County, CO	Genesee County, NY	Jackson County, NC	Cherokee County, GA
City of Fountain, CO	Livingston County, NY	Lee County NC	Columbus Consolidated Gov't, GA
City of Manitou Springs, CO	City of Portsmouth, NH	New Hanover County, NC	DeKalb County, GA
City of Amarillo, TX	City of Manchester, NH	Onslow County, NC	Douglas County, GA
City of Austin, TX	City of Norwalk, CT	Transylvania County, NC	Forsyth County, GA
City of Buda, TX	Town of Wethersfield, CT	Union County, NC	City of Miami Beach, FL
City of Denton, TX	Town of Plainville, CT	City of Beaufort, SC	City of Orlando, FL
City of Farmers Branch, TX	Town of Colchester, VT	City of Spartanburg, SC	City of Pensacola, FL
City of Fredericksburg, TX	Town of Bridgewater, MA	City of Chester, SC	City of Tallahassee, FL
City of Lockhart, TX	City of Cambridge, MA	City of Clemson, SC	City of Panama City Beach, FL
City of Pflugerville, TX	City of Milford, DE	City of Columbia, SC	City of Jacksonville Beach, FL
City of Rowlett, TX	City of Seaford, DE	City of Isle of Palms, SC	City of St. Petersburg, FL
City of Sachse, TX	City of Takoma Park, MD	City of Conway, SC	City of Palm Beach Gardens, FL
City of Seguin, TX	City of Baltimore, MD	City of Goose Creek, SC	City of Sarasota, FL
City of Portland, TX	City of Annapolis, MD	City of Lancaster, SC	City of Naples, FL
City of Del Rio, TX	City of Hagerstown, MD	City of Mauldin, SC	Town of Jupiter, FL
Brazoria County, TX	City of Hyattsville, MD	City of Folly Beach, SC	Indian River County FL
Denton County, TX	City of Westminster, MD	Town of Hilton Head Island, SC	Palm Beach County, FL
Fort Bend County, TX	City of Laurel, MD	Dillon County, SC	Miami-Dade County, FL
Hood County, TX	Prince Georges County, MD	Beaufort County, SC	Monroe County, FL
Kaufman County, TX	Allegany County, MD	Berkeley County, SC	Hillsborough County, FL
Randall County, TX	Talbot County, MD	Charleston County, SC	Orange County, FL
Matagorda County, TX	Washington County, MD	Dorchester County, SC	Monroe County, FL
City of Broken Arrow, OK	Frederick County, MD	Laurens County, SC	

B.2 Select Relevant Experience

Comprehensive Pay Plan/Compensation Review
City of Salina, Kansas

Evergreen Solutions was engaged with the City of Salina to conduct a Comprehensive Pay Plan/Compensation Review. Evergreen performed an extensive compensation review that compared the City of Salina's positions with comparable positions of other local government entities, including other Kansas cities of comparable size; and, where applicable, comparable public and private sector positions in the competitive market area. A review of internal equity was also conducted and job descriptions were updated, as needed. Evergreen also conducted a gender/race equity study and provided recommendations on to the City on how to make the compensation structure more equitable.

Classification and Compensation Study
City of Leawood, Kansas

Evergreen Solutions was retained by the City of Leawood to conduct a Classification and Compensation Study. Evergreen performed a review of the existing classification plan and related job descriptions and conducted a salary study to include public and private employers who provide comparable services. In the end, Evergreen prepared recommendations for compensation policies, including but not limited to: cost of living and merit pay increases, career ladders and variable incentive pay options to maintain competitiveness, reward employees, and to ensure internal pay equity.
Note: Evergreen was again hired in 2025 to conduct a salary study.

Comprehensive Compensation Study
Shawnee County, Kansas

Evergreen Solutions was engaged with Shawnee County to conduct a Comprehensive Compensation Study. Evergreen conducted an external competitive market study for all current County positions to measure County pay versus market rates for each position. Evergreen further prepared cost proposals and alternatives for establishing market pay rates for each position within three years following completion of the study and provided training to Department Heads and Human Resource Director in plan implementation and maintenance as needed.

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. **Note:** Evergreen was again retained in 2022 to conduct a Classification and Compensation Plan Update.

Classification and Compensation Study and Analysis
City of Broken Arrow, Oklahoma

Evergreen Solutions was retained by the City of Broken Arrow to conduct a Classification and Compensation Study and Analysis to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. Evergreen performed the following: reviewed all current job classifications, confirmed and recommended changes to hierarchical order of jobs using The City's evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers); identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation matrix and/or structure to meet the market analysis; and assessed potential impact of pending DOL changes.

Comprehensive Classification and Compensation Study
City of Branson, Missouri

The City of Branson hired Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to determine whether the City possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Branson.

Compensation Study
City of Lee's Summit, Missouri

The City of Lee's Summit retained Evergreen Solutions to conduct a Compensation Study to determine whether the City possessed a compensation and classification system that was equitable as compared to both the external competitive employment market as well as being internally equitable. The study included a complete classification analysis using the Job Assessment Tool and Management Issues Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including both benefits and salary surveys of competing organizations.

The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing systems in place at the City of Lee's Summit. Also included in this study was an evaluation of the City's performance evaluation system to include recommendations for improvement, revision of evaluation instruments and development of a brief training manual for the program.

Compensation and Benefits Study
City of Dardenne Prairie, Missouri

Evergreen Solutions was retained by the City of Dardenne Prairie to conduct a Compensation and Benefits Study. Evergreen reviewed the City's existing compensation and benefit plan, gathered necessary survey data from comparable municipalities in the St. Louis Metropolitan Area using a customized survey and recommended appropriate pay ranges for all positions (i.e., appropriate spread between minimum and maximum pay ranges and distance between steps, where appropriate). Evergreen further reviewed current job descriptions and titles and rewrote job descriptions to coincide with current responsibilities for each employee. Lastly, Evergreen provided the City with an Administration Manual with plan maintenance procedures. **Note:** Evergreen was again hired in 2025 to conduct a Classification and Compensation Plan update.

Comprehensive Compensation Study
City of Troy, Missouri

Evergreen Solutions was engaged with the City of Troy to conduct a Comprehensive Compensation Study. Evergreen performed the following tasks:

- identified criteria that was used in selecting comparable entities. For example, entities with similar population, similar geography, a similar mix of residential and commercial properties, and similar work force;

- identified the process to normalize the data to adjust for differences in city population, size, or other differences from Troy;
- developed pay/productivity ratios for each City department that demonstrated how much salary was paid on average by each city for certain levels of service;
- performed a job analysis for each position and conducted interviews with employees;
- reviewed all job descriptions and created updated descriptions as needed;
- performed an organization-wide operational efficiency study and identified staffing levels that deviated significantly from that of comparable entities.
- performed a market salary survey to determine competitive salary levels for all positions;
- performed survey of market to compare the type of fringe benefits provided to comparable entity employees that included, but were not limited to, health insurance, dental, vision, life, vacation, sick leave, annual holidays, education reimbursement, training and work hours;
- updated the present salary schedule; and
- recommended compensation policy regarding salary caps.

Compensation Study and Pay Equity Analysis
City of Fulton, Missouri

Evergreen Solutions was retained by the City of Fulton to conduct a Compensation Study and Staff Review that also included a comparison of benefit offerings in the market. Evergreen evaluated employee compensation and right-size staffing in terms of comparability and competitiveness, both from an internal equity and market perspective for similar municipalities and positions in the region. Evergreen also conducted a gender/race equal-pay analysis and provided recommended pay structures.

Compensation Study
City of Jefferson, Missouri

Evergreen Solutions was engaged with the City of Jefferson to conduct a Compensation Study. The primary focus area for this project to correct salary compression where it existed and external market benchmarking/ analysis in order to update the City's compensation plan to make it more competitive. Evergreen's consultants analyzed the effectiveness of the existing salary structure and recommend changes, if needed, based on best practices for municipal organizations within the market.

Employee Classification and Compensation Study
City of St. Louis, Missouri

Evergreen was hired by the City of St. Louis to conduct an Employee Classification and Compensation Study. Evergreen conducted a comprehensive evaluation and analysis of all 6,700 jobs within the City to determine relative value within the organization; evaluated all current job classifications; conducted internal salary relationship analysis and make appropriate recommendations; identified and recommended a relevant salary survey benchmark; identified potential pay compression issues and solutions; and provided a maintenance strategy to maintain.

Comprehensive Compensation and Classification Study
Jefferson County, Missouri

Jefferson County retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to analyze the County's market competitiveness and internal equity. Located just 40 miles southwest of the City of St. Louis, the County possessed a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments required special effort. With this in mind, this study included a comprehensive classification analysis using the Job Assessment Tool job valuation methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County.

Classification and Compensation Study
St. Charles County, Missouri

Evergreen Solutions was engaged with the St. Charles County Government to conduct a Classification and Compensation Study for its 1,650 employees. The primary purpose of the study was to assist the County in the evaluation of its overall employee compensation and pay structure as compared to the market; to perform a job audit and analysis for each full-time position to determine appropriate classification; and to update/develop job descriptions in a standardized format that is ADA and FLSA compliant. At the conclusion of the study, Evergreen provided a recommended job evaluation plan that will allow the County to evaluate positions every two years as well as provided an administration manual with plan maintenance procedures and a summary document that could be used to communicate the compensation system change to current and future employees.

Classification and Compensation Study
Jackson County, Missouri

Evergreen was retained by Jackson County to conduct a Classification and Compensation Study for more than 1,800 employees. Evergreen performed a job and analysis to ensure employee's duties and responsibilities were accurate. Evergreen updated job descriptions, reviewed the County's compensation structure, and provided recommendations to optimize the attraction and retention of employees. In the end, Evergreen prepared a report with findings and recommendations to improve the current classification and compensation system.

Classification and Compensation Study
Jasper County, Missouri

Evergreen Solutions was retained by Jasper County to conduct a Classification and Compensation Study. Evergreen performed the following tasks:

- conducted a review and update of the County's compensation (including benefits) of appropriate and comparable employers within the relevant "benchmark" data;
- identified inconsistencies and deficiencies within the current compensation and classification, provided written recommendations for their resolution, and developed a plan for the implementation of the recommendations which included the cost of implementation and the effect on employees;
- identified survey labor market and benchmark county/classes and established appropriate "benchmarking" standards and conducted a salary survey;

- recommended changes to existing salary range structures, including the establishment and/or modification of salary range tables and benefits;
- recommended and set forth a transition plan for the implementation of the compensation and classification plan;
- reviewed and analyzed internal position structures, made up of incumbent classifications and re-classifications and verified the accuracy of existing job descriptions to the duties, tasks, responsibilities and qualification requirements for each position, including the development of appropriate internal relationship guidelines;
- ensured all descriptions include contents met current legal requirements or recommendations;
- provided a plan for maintenance and updating of the compensation plan.

Compensation and Classification Study
City of Minneapolis, Minnesota

Evergreen was retained by the City of Minneapolis - Public Works Department to conduct a Compensation and Classification Study for Engineering Titles. Evergreen's analysis addressed the following: effectiveness of the current classification titles and salary structure; pay equity for comparable classification titles located both individually and organizationally across multiple Public Works divisions specifically analyzing each position's job description, title, and pay; competitiveness of current salary ranges to other comparable public and private employers in the region; identification of essential job functions; FLSA designations; and mapping career growth based on vertical, lateral and cross-functional roles.

Review of Classification and Compensation System
City of Rochester, Minnesota

Evergreen was hired by the City of Rochester to review the City's Classification and Compensation System. The scope of work will consist of reviewing the current compensation philosophy, policy and system, recommending a new job evaluation system, reviewing exempt and non-exempt position designations under FLSA guidelines, performing a compression analysis to identify individual or group pay compression issues and providing potential solutions, performing system testing to assure MN Pay Equity Compliance, and presenting options and recommendations for a classification and compensation plan.

Total Compensation Study
Genesee County, Michigan

Evergreen Solutions was retained by Genesee County to conduct a Total Compensation Study. Evergreen performed the following tasks: established appropriate benchmarking standards and conducted salary surveys for similar positions with comparable municipalities and private employers within the same geographic area as required; developed and conducted a comprehensive compensation and benefits survey; analyzed and recommended any changes to the current fringe benefits, wages, and salary structures in order to become or remain competitive with comparable municipalities and private employers within the same geographic area; and provided an estimate of future adjustments, in the next 1-3 years, to maintain a competitive position with other comparable municipalities and private employers within the same geographic area.

Salary and Benefits Study
City of Bloomington, Indiana

Evergreen Solutions was retained by the City of Bloomington to conduct a Salary and Benefits Study. Evergreen examined the wages and benefits of the City's employees (including transit) as compared to public and private sector entities in Indiana and surrounding areas to determine whether the City's wages and benefits were competitive in the market.

Classification and Compensation Study
City of Moline, Illinois

Evergreen Solutions was retained by the City of Moline to conduct a Classification and Compensation Study. The objectives of the study were to: develop a new classification plan to provide consistency in the administration of the personnel system; ensure job descriptions accurately reflect the duties and responsibilities of the positions; review exempt status as defined by the Fair Labor Standards Act (FLSA) for certain positions; provide a compensation plan that assures proper internal relationships among classes; and provide recommendations concerning salary levels reasonably comparable to the Quad Cities area pay levels of major public employers.

Classification and Compensation Study Services
City of Urbana, Illinois

Evergreen Solutions was engaged with the City of Urbana to provide Classification and Compensation Study Services. The City of Urbana had sought to achieve the following goals:

- maintain a high level of employee satisfaction by providing a classification and compensation system that is both fair and competitive;
- demonstrate fiscal responsibility to the community by providing a classification and compensation system that makes the best of The City's financial resources; and
- ensure a close alignment between pay and performance by providing a classification and compensation system that rewards merit.

Compensation Study and Analysis
McLean County, Illinois

Evergreen Solutions was engaged with McLean County to conduct a Compensation Study and Analysis. Evergreen's consultants performed a comprehensive, valid and reliable job analysis/evaluation of each job class within the County to determine if the current pay grade levels for all classified and appointed positions were still appropriate and conducted a comprehensive wage and benefits survey(s) for the purpose of ensuring that the County pay plans/pay structures and benefits possess external equity and labor market competitiveness. In the end, Evergreen developed a maintenance program to address the need for new job analysis/evaluation (including pay grade recommendation), creation of new job description(s), and the continued maintenance of the Pay Classification Plans.

Compensation Study
City of Winchester, Kentucky

Evergreen Solutions was retained by the City of Winchester to conduct a Compensation Study. Evergreen conducted a market analysis of the City positions with comparable and surrounding jurisdictions to determine the City's overall market position.

Compensation and Classification Consulting Services
City of Clarksville, Tennessee

Evergreen Solutions was engaged with the City of Clarksville to provide Compensation and Classification Consulting Services for more than 1,450 employees. Evergreen reviewed the City's current compensation plan, gathered necessary salary data from comparable organizations within a 200-mile radius. Evergreen also evaluated the City's current classification positions, gathered necessary employee information using a combination of job analysis questionnaires as well as supervisor and employee interviews to determine whether individuals were appropriately classified. Evergreen further updated job descriptions and made FLSA determinations.

Classification and Compensation Study Services
City of Murfreesboro, Tennessee

Evergreen Solutions was engaged with the City of Murfreesboro to provide Classification and Compensation Study Services. Evergreen conducted a compensation survey by identifying comparable organizations and competitive labor markets for selected position classifications and evaluated the pay structure relative to current labor market conditions to assure the City remains competitive for hiring at various grade levels of employment, including compensation analysis and reporting based on similarly situated employees, similar skills, qualifications, responsibilities, and pay, using job family groupings and EEO job categories that comport with EEOC guidelines for government employers.

Compensation Study
City of White House, Tennessee

Evergreen Solutions was retained by the City of White House to conduct a Compensation Study. Evergreen reviewed Total Compensation (compensation and benefits) for City employees and provided recommendations of possible wage adjustments that would align with the City's compensation philosophy. Evergreen provided a valid analysis of where the City of White House stood relative to peer municipalities regarding compensation of employees in both base pay and total compensation packages.

Compensation Study
City of Morristown, Tennessee

Evergreen Solutions was retained by the City of Morristown to conduct a Compensation Study. Evergreen's consultants examined employee wages and benefits to assess the competitiveness of the existing compensation and benefits system and to consider the functionality of the current system. Evergreen worked with the administration to establish and prescribe any necessary adjustments to the classification and compensation pay plan and provided related strategies for implementation.

Classification and Compensation Study
City of Cleveland, Tennessee

Evergreen was hired by the City of Cleveland to conduct a Classification and Compensation Study. The goals of the study are to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic areas.

Employee Classification and Compensation Study
Blount County, Tennessee

Evergreen Solutions was retained by Blount County to conduct an Employee Classification and Compensation Study for its workforce. Evergreen conducted focus groups and interviews with employees and employees completed a Job Assessment Tool (JAT) that identified work performed. Evergreen presented to the Human Resources Director and Mayor any resultant classifications recommended in the classification study and provided for the maintenance of the new structure, including periodic review, reclassification review procedure and promotion guidelines.For the compensation study, Evergreen identified survey labor market and benchmark classes to use for a market analysis; conducted a comprehensive compensation search utilizing other similar public sector employers; completed internal salary relationship analysis, including the development of appropriate internal relationship guidelines; developed externally competitive and internally equitable salary recommendations for each class included within the study in order to maintain appropriate competitive position in relation to other employers within the region; and assigned a salary range to each classification which reflected the results of the market survey and the analysis of internal relationships. Evergreen presented survey results to management to make a decision on overall pay philosophy. In the end, Evergreen recommended appropriate premium pay options to supplement the compensation plan. Examples included options for pay for certifications, professional licenses, special skills, temporary "acting" assignment at higher level duties, "on-call" and "callout" pay, pay alternatives for exempt level workers not normally eligible for overtime, and similar pay practices. **Note:** Evergreen Solutions was again retained by the County to conduct a Compensation Plan Update.

Employee Compensation and Classification Study
Mahoning County, Ohio

Evergreen Solutions was retained by Mahoning County to conduct an Employee Compensation and Classification Study for all the County's 1,746 employees. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. Pay ranges were further analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen's consultants also reviewed and updated existing job descriptions and determined FLSA designations for each job title/classification. Evergreen designed an implementation strategy for the compensation system with the lowest financial impact on the County's operating budget and with the greatest gain to positions that fell outside of a designated range. In the end, recommendations were made to improve the fairness and equity in the current system.

Compensation Study
Montgomery County, Pennsylvania

Evergreen Solutions was retained by Montgomery County to conduct a Compensation Study. The study included an examination of the County's compensation plan in order to provide recommendations for compensation policies, procedures and practices which covered 3,100 full-time employees. and allowed the County to be competitive in the marketplace for attracting and retaining qualified employees.

Evergreen recommended and identified a market position for the County by administering a comprehensive labor market salary survey to select public and private sector peers. Evergreen also conducted a comparative analysis of benefits provided in the market that included PTO, health, dental, vision and prescription, including percentage of contribution between employee and employer, long term disability (LTD), life insurance and pension benefits. Evergreen then recommended appropriate salary ranges (i.e., min, mid, and max) for all non-represented classifications. Evergreen prepared a cost analysis for the recommended salary ranges

Gender Disparity Study
City of Pittsburg, Pennsylvania

Evergreen Solutions was on contract with the City of Pittsburgh to conduct a Gender Disparity Study to evaluate the relative fairness and internal equity of the classification and compensation system for its more than 3,400 employees. The study included a review of the current system specifically focusing on an: analysis of the existing position/job analysis tools; analysis of the classification process and issues of internal pay equity; and analysis the reliability of the current job classification rating system in producing equitable classification and pay relationships among all employees regardless of gender or other bias.

Compensation and Classification Review
City of Cambridge, Massachusetts

Evergreen was hired by the City of Cambridge to conduct a Compensation and Classification Review for its 3,000 employees. The goals of this study are to: identify and mitigate pay equity disparities; attract and retain highly qualified employees; ensure salaries are commensurate with the responsibilities assigned; facilitate recognizable growth; establish justifiable pay differentials between individual roles; and maintain a competitive standing to the City's competitors and surrounding areas. Evergreen will analyze the city's compensation plan to identify recruitment and retention challenges; recommend a competitive market position for the city; prepare recommendation and impact analysis for positions above the maximum salary grade and step following reclassification; and provide staff training to maintain and revise the system as needed.

Classification and Compensation Study and Analysis
Town of Bridgewater, Massachusetts

Evergreen Solutions was retained by the Town of Bridgewater to conduct a Classification and Compensation Study and Analysis. The purpose of study was to address changes in Town operations and staffing over the past several years, which might have affected the type, scope, and level of work being performed and to also address Police and Fire compensation that took into account the various benefits.

The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, authority, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same general geographic areas.

Compensation Study
City of Portsmouth, New Hampshire

Evergreen Solutions was retained by the City of Portsmouth to conduct a Compensation Study. Evergreen evaluated employee compensation in terms of comparability and competitiveness from a market perspective with similar municipalities and positions in the region and provided recommendations to assist the City in recruiting and retaining a quality workforce.

Classification and Total Compensation Review
City of Manchester, New Hampshire

Evergreen Solutions was retained by the City of Manchester to conduct a Classification and Total Compensation Review of 1,200 employees. Evergreen performed the following tasks in order to achieve the City's goals: conducted a job analysis, updated, and evaluated comprehensive wage, benefits, and PTO market survey and comparisons; developed a compensation philosophy and communication plan; revised performance assessment and evaluation system; provided tools and training; and provided recommendations and reports.

Job Classification and Compensation Study
Town of Wethersfield, Connecticut

Evergreen Solutions was retained by the Town of Wethersfield to conduct a Job Classification and Compensation Study. The objectives of the study were to conduct a total compensation plan structure which will provide both internal and external equity, to establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, to determine and implement a program of accurate job descriptions based on job analysis, and to develop a maintenance program for job descriptions and classification recommendations.

Classification and Total Compensation Study
Town of Plainville, Connecticut

Evergreen was hired by the Town of Plainville to conduct a Classification and Total Compensation Study. Evergreen reviewed the current classification grade methodology and proposed recommended strategies for addressing issues with the Town; conducted a compression analysis; identified career ladders and promotional opportunities; recommended a classification structure based on finding from the job evaluation process; recommended an appropriate salary range for each position based on finding from a market salary survey; identified any extreme current individual or group inequalities and provided a recommended corrective action plan and process to remedy those; and provided implementation strategies.

Compensation Consultation Services
Genesee County, New York

Evergreen was retained by Genesee County to provide Compensation Consultation Services for all full-time positions in the public sector. Evergreen provided recommendations to address any anomalies within current pay structures. Evergreen also performed the following tasks: conducted a survey of salaries; conducted interviews and/or job audits with employees; provided recommended salary ranges for each position; provided a recommended strategy for implementing any changes to the pay plan; and provided training for County HR staff to enable them to effectively use and maintain the market competitiveness.

Employee Compensation Study
Livingston County, New York

Evergreen was hired by Livingston County to conduct an Employee Compensation Study. The scope of work will consist of reviewing the County's job specifications and organizational structure; performing a market salary survey of private and public-sector benchmarks; identifying a set of comparable municipal organizations and gathering relevant compensation and benefit data; identifying critical obstacles to public-sector recruitment strategies; including any specific challenges for the County; providing a compensation plan and salary schedule based on the market survey results; reviewing existing staff compensation to determine inequities in pay and making recommendations; completing an internal salary-relationship analysis, including the development of appropriate internal equity; reviewing the County's benefits offerings and advising on additional recruitment and retention barriers; preparing an analysis of the financial impact of implementing any recommendations; and presenting the final report to the public and the County Board of Supervisors.

Compensation Study
City of Seaford, Delaware

Evergreen was hired by the City of Seaford to conduct a Compensation Study. The primary objectives of the study were to: attract and retain qualified workers; provide market rate salaries to all workers; enable the City to maintain a competitive position with other comparable municipalities and private companies within the same geographical area; and establish practices and policies to continue to meet the objectives in future years. In the end, Evergreen updated the City's current classification titles, job titles, and compensation plan for the City.

Classification and Compensation Study
City of Milford, Delaware

Evergreen was hired by the City of Milford to conduct a Classification and Compensation Study. Evergreen conducted a job analysis as well as an market salary to ensure internal and external equity. **Note:** Evergreen was previously hired by the City in 2021 to conduct a Job Classification and Compensation Study.

Classification and Compensation Study Services
City of Westminster, Maryland

Evergreen Solutions was retained by the City of Westminster to provide Classification and Compensation Study Services. The scope of work included the review and updating of the City's current job descriptions as well as providing technical assistance in the development of a comprehensive performance evaluation system to integrate with the new classification system. The primary objectives for this study was to:

- develop a formal compensation philosophy for adoption by the Mayor and Common Council;
- identify comparable benchmark employers to guide the City's future employee salary and benefit decisions to facilitate the attraction and retention of high-performance staff members, while being financially sustainable;
- establish a comprehensive job classification system using the approved job evaluation system that accommodates the City's needs for an internally and externally equitable, defensible, market sensitive, and easily administered system for all current and future positions within the City;
- train Human Resources staff to apply the adopted compensation philosophy to maintain the adopted classification and compensation system; and
- provide legally defensible classification specifications (ADA, FLSA, and any other applicable federal and state laws).

Note: Evergreen was again hired in early 2021 to conduct a Compensation Plan update.

Salary and Benefits Review, and Analysis
City of Hyattsville, Maryland

Evergreen Solutions was hired by the City of Hyattsville to conduct a Salary and Benefits Review and Analysis of all classifications. The process included a comprehensive review of market compensation averages using a detailed duties-based salary survey approach as well as a comprehensive benefits survey. Market position was determined, a compensation philosophy was developed and strategic positioning recommendations were made with the goal of providing the City a more equitable compensation model. **Note:** Evergreen was again hired in 2016 to conduct a Compensation System Analysis for the City. Evergreen also conducted a Compensation Plan Update for the City in 2023.

Classification and Compensation Study
City of Laurel, Maryland

Evergreen was retained by the City of Laurel to conduct a Classification and Compensation Study. The scope of work included: defining a process for updating job description content; updating and/or creating new job descriptions for each classification ensuring that they meet all required legal standards, especially Equal Employment Opportunity and Americans with Disabilities Act (identification of essential job duties); determining the exempt or non-exempt status of each position, pursuant to the Federal Labor Standards Act; conducting a full market analysis of the classification and compensation structure for all City positions; recommending improvements to the current classification and compensation system or proposing a new system based on results from the market analysis that meet the requirements of the law, assures internal equity and external competitiveness, has the ability to be coordinated with current labor agreements, incorporates market conditions identified in the study, and standardizes and reduces the number of classifications in the City, if necessary or appropriate; reviewing the City's current merit program and providing a detailed assessment and any recommended adjustments; developing an implementation plan that includes senior staff management, employee, and union representation communication regarding results of the study and individual position classification and compensation assignments; and providing training on the use and maintenance of the system.

Classification and Compensation Plan Review
City of Annapolis, Maryland

Evergreen Solutions was engaged with the City of Annapolis to conduct a Classification and Compensation Plan Review. The primary objectives of the study were to: review and revise the current classification system; review and revise job descriptions; determine relevant competitive markets by conducting a salary survey of selected peer organizations; propose guidelines for an improved or new compensation program; and provide recommendations to keep the current pay structure competitive.

Job Classification and Compensation Study
City of Baltimore, Maryland

Evergreen Solutions was engaged with the City of Baltimore to conduct a Job Classification and Compensation Study. Evergreen conducted a total compensation survey using both private and public companies, using not only job titles, but duties and responsibilities based upon classification specifications for the seven existing classifications (i.e., Engineers, Nurses, Public Health Representative, Forensic Scientist, Safety Enforcement Officers) from the City. Based on the results, Evergreen determined the most appropriate market pay for each position in consideration of the City's compensation practices/philosophy. Evergreen further completed an internal base salary relationship analysis, including the development of appropriate internal relationship and equity guidelines, developed external competitive and internal equitable salary recommendations for each classification included within the study, and prepared and recommend a salary range to each classification which reflected the results of the market survey and the analysis of the internal relationships to include impact analysis.
Note: Evergreen was again hired in both 2022 and 2023 to conduct a Compensation Study.

Compensation Study
City of Hagerstown, Maryland

Evergreen Solutions was retained by the City of Hagerstown to conduct a Compensation Study. Evergreen's consultants worked with the City to evaluate what type of pay plan would reinforce current and future goals. Evergreen identified external targets for surveying select positions. After conducting the market salary survey, Evergreen produced a pay plan for employees that best met the needs of the City and included the number of grade, steps, and ranges as well as recommendations for continued administration of the compensation system.

Wages and Salary Scale Study
Washington County, Maryland

Evergreen Solutions was retained by Washington County to conduct a comprehensive study of the County's wages as they related to neighboring jurisdiction's wages and salaries, the purpose of which was to assure adequacy of pay and employee wages when compared to area private and public employees. Evergreen met with each Division Director to gather information regarding pay issues that were unique to their departments. Evergreen conducted a brief review of the method of classifying positions to ensure its adequacy in today's pay and classification environment. Using the current or revised classification system, Evergreen evaluated all positions and placed them in an appropriate "grade". Evergreen recommended a system the County could use in the years to come to evaluate job positions.

Compensation Study
Allegany County, Maryland

Evergreen Solutions was engaged with Allegany County to conduct a Compensation and Classification Study. The County was looking for an overall review and recommendations on its current compensation and classifications. To accomplish this, Evergreen conducted: a market and compression analysis; a classification structure review; and a performance evaluation study. Evergreen then provided merit system recommendations. **Note:** Evergreen previously worked with the County to conduct a Comprehensive Compensation Study and analysis for the Office of the Sheriff.

Classification and Compensation Study
Frederick County, Maryland

Frederick County has retained Evergreen Solutions to conduct a Classification and Compensation Study for the County's 2,950 employees. Evergreen will conduct a job analysis to determine internal equity within the County and update job descriptions based on findings from the analysis. Evergreen will also conduct a salary survey by comparing the County's positions to the market in order to provide recommendations to the County to make salaries more competitive for recruitment and retention purposes. **Note:** This project is nearing completion.

Classification and Compensation Study
Prince George's County, Maryland

Evergreen Solutions was retained by Prince George's County to conduct a Classification and Compensation Study for approximately 7,000 employees. Evergreen performed the following tasks: conducted a job analysis to establish and/or redefine grades, classifications groups, and job relationships; identified benchmark jobs from each grade/classification to survey in the market; determined a relevant job market; conducted a customized market salary survey; performed survey data analysis and recommended appropriate pay structures; provided a cost analysis of all recommendations; and presented a final report to the County. Evergreen also provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Classification Study
Talbot County, Maryland

Evergreen was retained by Talbot County to conduct a Classification Study. Evergreen conducted a job analysis to determine the appropriate hierarchy of jobs within the County and updated job descriptions as needed. **Note:** Evergreen was again hired in 2024 to provide Job Performance Tracker and Competency Building to the County.

Classification and Compensation Study
Garrett County, Maryland

Evergreen was retained by Garrett County to conduct a Classification and Compensation Study. Evergreen conducted a preliminary assessment of the County's existing compensation plan as well as collected and reviewed current environmental data within the County. Evergreen then evaluated and built a projected classification plan, followed by collecting market salary survey data. Strategic positioning recommendations were made prior to formulations of the solution analysis. A final report was presented to the County with recommendations to update the compensation and classification plans along with implementation strategies.

Compensation and Classification Study
Charles County, Maryland

Evergreen Solutions was engaged with Charles County Government, Maryland to conduct a Compensation and Classification Study. The purpose of the study was to review the classification and compensation system; conduct a compression analysis and prepare a compensation philosophy; conduct a market analysis; prepare a new pay plan; and provide recommendations for pay incentives, supplements, and policies.

Compensation Study
Town of Ocean City, Maryland

Evergreen Solutions was engaged with the Town of Ocean City to conduct a Compensation Study. Evergreen conducted an analysis of pay against the market and prepared a summary report of the survey results in order to make recommendations for updating the Town's pay plan.

Classification and Compensation Study
City of Falls Church, Virginia

Evergreen Solutions was engaged with the City of Falls Church to conduct a Classification and Compensation Study. Evergreen's consultants evaluated the City's present classification system and compensation structure as it compared to the local and regional job market for comparable public sector employers, municipalities and local market competitors. In addition, Evergreen evaluated all positions to determine the relative worth in the City for internal equity and establish pay ranges and progression within the ranges. Evergreen further conducted an analysis of gender pay equity and provided recommendations to the City.

Pay and Classification Study
City of Williamsburg, Virginia

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

Classification and Compensation Study
City of Fredericksburg, Virginia

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Classification and Compensation Study. Evergreen conducted a full job analysis of City positions and revised, if necessary, existing job descriptions based upon the findings of the job analysis. Evergreen also surveyed the local labor market to ensure that the City's overall package of compensation and benefits was competitive and evaluated whether the City's current human resources policies were affecting the City's ability to compete in the labor marketplace. Evergreen assisted the City in updating its current classification and compensation plan and developing a strategy to increase employees' pay to a competitive level that aligned with the results of the study. Evergreen provided recommendations to the overall classification and compensation plan that provided internal equity and that was competitive in the marketplace to attract and retain qualified employees.

Evergreen Solutions was engaged with the City of Norfolk to conduct a Classification and Compensation Study. Evergreen conducted a job analysis to determine internal equity as well as an external labor market analysis to determine whether the City was competitive with its peers.

Classification and Compensation Study
City of Norfolk, Virginia

Evergreen Solutions was hired by the City Norfolk to conduct a Compensation Study. Evergreen will review existing compensation plans and understand current challenges in recruiting and retaining employees; provide the City with a review of benchmark cities' compensation policies; propose a comprehensive plan; recommend appropriate placement of each existing position on the proposed step plan; complete a compression analysis and provide recommendations; and recommend implementation strategies. The City of Norfolk had 5,000 employees at the time of the study. **Note:** Evergreen was previously hired in 2022 to provide Consulting Services for Compensation Program Transition.

Consulting Services for Compensation Program Transition
City of Newport News, Virginia

Evergreen Solutions is retained by the City of Newport News to provide Consulting Services for Compensation Program Transition. Evergreen will carry out a feasibility study, entailing an assessment/evaluation of the City's current compensation program/pay structure (traditional salary ranges) and the viability/practicability of the City's transition from its current pay structure to a broadband pay structure, or multiple structures for specific work groups. **Note:** Evergreen previously conducted a job comparability study for the City and the Newport News Sheriff's Office.

Classification and Compensation Study
City of Hopewell, Virginia

Evergreen was hired by the City of Hopewell to conduct a Classification and Compensation Study. Evergreen will perform he following tasks: review current classification grade methodology and propose recommended strategies for the City; update and/or create ADA compliant job descriptions; compare position description questionnaires to existing job descriptions; analyze existing internal hierarchy based on job relationships, identify problem areas within the internal hierarch system, and propose implementation methods to correct identified problems; recommend appropriate salary range for each existing or proposed position; recommend implementation strategies; and conduct a compression analysis.

Comprehensive Classification and Compensation Study
Isle of Wight County, Virgina

Evergreen Solutions was again engaged with Isle of Wight County to conduct a Comprehensive Classification and Compensation Study which assisted the County in updating its classification plan, revising salary administration guidelines, and developing a compensation philosophy within the competitive labor market. The study also evaluated the County's internal equity (compression) as well as the current classification and salary structures as compared to the job market for comparable positions in other municipalities, and in the private sector when appropriate.

The County's objectives for the study were to: attract and retain highly qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and required knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth (e.g., Career Development Program for non-sworn employees); provide justifiable pay differential between job classifications; maintain a competitive market position with other comparable government entities and private employers (as applicable) within the same geographic areas; address pay compression and equity issues; and recommend additional pay incentives and supplements that can be considered to remain competitive in the market. **Note:** Evergreen previously conducted a similar study for the County.

HR Market Study
Botetourt County, Virginia

Evergreen Solutions was retained by Botetourt County to conduct an HR Market Study. Evergreen determined the salary range of profiled entities compared to the County for each covered position's minimum, midpoint and maximum; examined the existing employee average salary of profiled entities compared to each County's positions; determined the County's market position for each position individually and overall; and reviewed EEO category and exempt status for all 25 positions; and provided a recommendation for needed revisions to the County's pay plan

Job Analysis
Prince William County, Virginia

Evergreen Solutions was retained by Prince William County to conduct a Job Analysis of one position. Evergreen used a Job Assessment Tool to analyze the position and determine the proper placement with the current pay plan.

Classification and Compensation Study
County of Culpeper, Virginia

Evergreen was retained by Culpeper County to conduct a Classification and Compensation Study. The objectives of the study included the following: attract and retain qualified employees; ensure that positions performing similar work with essentially the same level of complexity and responsibility are classified together; ensure that salaries are commensurate with assigned duties; provide options for compensation growth; provide equitable salaries for all employees of the County; and, provide the County with a salary structure that enables the County to maintain a competitive position with other Counties within the same geographic area. **Note:** Evergreen previously conducted a similar study for the County.

Classification and Compensation Study (Phase I)
Loudoun County, Virginia

Evergreen Solutions was engaged with Loudoun County to conduct a Classification and Compensation Study. Evergreen conducted a comprehensive review and evaluation of the County's compensation philosophy and competitive market and made recommendations to retain, modify and/or change the compensation philosophy and/or competitive market. Evergreen also conducted a comprehensive review and evaluation of policies governing the County's total compensation program (pay and benefits offerings) and classification system; benchmarked the elements of the County's total compensation and classification program against its current competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify and/or change elements of the total compensation and classification program.

Evergreen further conducted a comprehensive review and an evaluation of the County's performance plan system; benchmarked the County's system against the job description systems of its competitive market and other potential competitor jurisdictions; and made recommendations to retain, modify, or change the current system. In the end, Evergreen provided comprehensive recommendations for modifying classification and compensation policies and procedures.

Classification and Compensation Study (Phase II)
Loudoun County, Virginia

Evergreen Solutions was again hired by Loudoun County to conduct a Classification and Compensation Study (Phase II) for more than 3,500 employees. Evergreen accomplished the objectives of the Phase II of the study by performing the following tasks:

- developed recommendations on a strategy to implement and administer a compensation philosophy range of 95 percent to 105 percent of the comparator market;
- conducted a comprehensive benchmark market analysis of all County jobs;
- developed a new market competitive pay plan to include an open range pay plan for the general workforce and a "grade and step" pay plan for Public Safety positions;
- provided recommendations for any additional pay incentives and supplements that assisted in maintaining competitive pay as described in Loudoun's compensation philosophy;
- reached out to peers for information relating to pay grades, pay policies, and benefits information;
- developed a new comprehensive classification system that allows for more levels and specificity within and across each job group, to include the development of standardized job descriptions;
- obtained an analysis of pay compression within the County and recommendations for addressing pay compression once a new pay plan was implemented; and
- developed recommendations for revisions to the Board approved classification and compensation policies found in Chapter 5 of the Human Resources Handbook.

Classification and Compensation Study
Chesterfield County, Virginia

Evergreen Solutions was on contract with Chesterfield County to conduct a Classification and Compensation Study and Pay Plan Development for Public Safety. The study included an examination of the County's classification and compensation system in order to make recommendations for compensation policies, practices, and procedures; and develop a Public Safety Pay Plan. Evergreen worked with the County to develop a comprehensive plan for County employees based upon an objective analysis and thorough evaluation of job content and internal equity. Evergreen reviewed current job descriptions, salary relationships, classifications, and grade methodology. Based on this review and a compression analysis, Evergreen recommended pay and classification strategies for the County. Evergreen also identified and recommended pay incentives and supplements for employees and policies and procedures to administer the new Public Safety Pay Plan. **Note:** Evergreen was again hired in 2021 by Chesterfield County and Chesterfield County Public Schools to conduct a Compensation Study. Chesterfield County had 3,600 employees at the time that were included in the study.

Classification and Compensation Study
Mecklenburg County, Virgina

Evergreen Solutions was engaged with Mecklenburg County to conduct a Compensation and Classification Study. Evergreen evaluated current positions, inclusive of current County, Constitutional Officers, and Social Services positions, and surveyed participants/comparable organizations from a pre-determined list of entities and developed and implemented a compensation study that included wages as well as local government-controlled benefits, such as employer and employee healthcare contribution percentages, Flexible and Health Savings Account matches, and leave accruals; and analyzed the results (Local government-controlled benefits does not include contributions to the Virginia Retirement System). Evergreen further reviewed the position descriptions for individuals and developed a classification plan to include all County Departments, Constitutional Officers, and Social Services(Directors and employees); document and develop, as necessary, the requirements of each position including, education, experience, certification and other related information; assigned each job description to a classification system that reflected equitable placement between the various job responsibilities; and provided suggestions for retitling any current positions, as necessary, to remain competitive, based on the compensation study as well as general market knowledge.

Classification and Compensation Plan Review and Guidance
City of Raleigh, North Carolina

Evergreen was hired in the latter part of 2020 to provide Compensation and Classification Plan Review and Guidance to the City for its workforce of more than 4,500 employees to ensure that the City was competitive with the regional market. **Note:** Evergreen was hired in 2019 to analyze compression for the City's fire and police pay plans and recommend conversion options for open range pay plans. In addition, Evergreen was hired in 2020 to review the organizational structure of the Transportation Planning Service Unit.

Classification and Compensation Study
City of Rocky Mount, North Carolina

Evergreen Solutions was retained by the City of Rocky Mount to conduct a Classification and Compensation Study for its 1,365 employees. Evergreen's consultants conducted a comprehensive salary study of appropriate public and private sector organizations as well as non-profits and utilities to determine whether the City's salaries, benefits and wages were competitive within the appropriate job market and reviewed the effectiveness of the City's overall compensation system. Evergreen further reviewed the City's salary structure and pay plan to ensure the City can support recruitment and retention of employees more effectively and reviewed the accuracy of position titles and descriptions regarding unique characteristics of the position, essential job functions, minimum qualifications, working conditions, licensing requirements, on-call requirements, and supervisory requirements, etc. Evergreen also provided an analysis of the existing internal hierarchy and internal career ladders where appropriate and assisted the city with efforts to more fully develop and clearly outline job progression opportunities and provide recognizable compensation growth. In the end, Evergreen developed and presented final recommendations with an implementation plan that included the impact of implementing recommended adjustments to current salaries both immediately and in the future. **Note:** Evergreen was again hired in 2024 to conduct a compensation plan update for the City.

Compensation and Classification Study
City of Goldsboro, North Carolina

Evergreen Solutions was engaged with the City of Goldsboro to conduct a Compensation and Classification Study. Evergreen's consultants evaluated the current compensation and classification systems for the City; conducted a market survey of comparable peer organizations; developed a final report that outlined the methodology used to conduct the compensation and classification study, documented the results of the study, including all market research; and developed recommendations for the administration of the updated compensation and classification systems.

Classification and Compensation Study
City of Hendersonville, North Carolina

Evergreen Solutions was retained by the City of Hendersonville to conduct a Classification and Compensation Study. The study included the review of the existing classification plan, position descriptions and methods of reclassification, the performance of a salary study and the preparation of pay plan schedules, job descriptions.

Classification and Compensation Study
City of Southport, North Carolina

Evergreen was retained by the City of Southport to conduct a Classification and Compensation Study. Evergreen reviewed the current City's environment data; evaluated and built a projected classification plan; conducted a market salary survey; developed strategic positioning recommendations and recommendations for compensation administration; and provided revised class descriptions and FLSA determinations.

Pay and Classification Study
Buncombe County, North Carolina

Evergreen Solutions was retained by Buncombe County to conduct a Pay and Classification Study. Evergreen Solutions conducted a classification analysis using Evergreen Solutions' Job Assessment Tool job evaluation methodology in addition to a statistical assessment of current conditions. Evergreen Solutions also analyzed local market and benefits data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation and classifications plan were made and procedures for the continued maintenance of the plans were provided. **Note:** Evergreen was again hired in 2023 to conduct a Compensation Study.

Position Analysis and Revision Project
Harnett County, North Carolina

Evergreen Solutions was retained by Harnett County to conduct a Position Analysis and Revision Project. Evergreen's consultants conducted an analysis of current County positions to determine the plan of action, whether to completely recreate the descriptions or to possibly update those that were more current, resulting in a consistent format for all descriptions. Evergreen then made recommendations regarding the process; provide implement options; provided recommendations and training for best practices to maintain up-to-date descriptions going forward; advised the County regarding FLSA Exempt/Nonexempt status for all updated job descriptions; and assessed the County positions to determine any opportunities for consolidation of existing positions and job descriptions.

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 1,592 employees. The primary objective of the study was to implement a fair, consistent, competitive, equitable, and legally defensible classification and compensation system that allowed the County to attract, reward and retain qualified individuals. To accomplish this, Evergreen Solutions' consultants performed a comprehensive review of the County's classification and compensation system which included conducting an internal equity analysis of employee salaries.

Evergreen conducted a market analysis in which the County's salary ranges and benefit offerings were compared to the salary ranges and benefit offerings at peer organizations. Evergreen Solutions provided recommendations to create a system that not only aligned with the State of North Carolina's substantially equivalency requirement, but allowed for flexibility so as not to inhibit those departments that were not required to have this alignment. **Note:** Evergreen was again hired in 2021 to conduct a similar study for the County.

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

Evergreen Solutions was retained by New Hanover County and the New Hanover Alcohol Beverage Control Board to conduct a Classification and Compensation Study for its employees. Evergreen Solutions' consultants conducted an employee classification and compensation study of public and private employers who were providing equitable services and, based on that study and determined if individualized position/job descriptions were needed, and if so, assisted in the development of those descriptions. Evergreen Solutions prepared a comprehensive analysis that identified New Hanover County's competitive position in the labor market and provided a recommendation for total salaries and benefits, including the total compensation package of insurance and other benefits (including paid leave), and prepared recommendations for compensation policies, including variable incentive pay options, to maintain competitiveness, reward employees, and ensure equity.

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

Note: Evergreen was again hired in 2022 to conduct an update of the County's Classification and Compensation plans.

Compensation and Classification Study
Transylvania County, North Carolina

Evergreen was retained by Transylvania County to conduct a Compensation and Classification Study. Evergreen evaluated the current compensation and classification plan and identified classification of existing positions. Evergreen identified appropriate benchmarking standards and conducted a total compensation survey with comparable municipalities and private sector employers, when applicable. Survey data was provided to the County in a usable electronic format for analysis for each position. Evergreen conducted a solution analysis and developed strategic positioning recommendations. Evergreen reviewed the total compensation system, identified potential pay compression and/or inequities (both internally and to the market), and provided recommendations. **Note:** Evergreen was again hired in 2022 to conduct a Compensation and Benefits Study.

Compensation and Classification Study
Union County, North Carolina

Evergreen Solutions was retained by Union County to conduct a Compensation and Classification Study. Evergreen Solutions performed the following tasks:

- conducted a comprehensive evaluation of every classification within the County to determine relative worth within the organization (internal equity), placement in the organizational pay plan and for the establishment of pay bands;
- established appropriate benchmarking standards and included should be a comparison and analysis of salaries and wages of like or similar jobs (external equity) in comparable government and private employers in North Carolina, South Carolina and Virginia for which the County competed for a labor supply;
- created class/position descriptions that included required knowledge, skills and abilities (KSA) for each position class in a standardized format. The analysis produced a sampling that produced statistical reliability and valid results;
- recommended needed changes to the existing compensation & classification plan to alleviate salary compression issues;
- provided a multi-year implementation plan to adjust compensation as identified in analysis;
- provided a synopsis prepared for management review, covering the salient features of the proposal including overall costs and term of work; and
- provided a procedure manual and training for Human Resources employees that enable them to maintain the recommended classification and compensation plan.

Salary Equity Study
Guilford County, North Carolina

Evergreen Solutions was retained by Guilford County to assess pay equity based on race and gender for all County employees. Evergreen's consultants performed a review of approximately 1,500 plus positions for internal salary equity. This was accomplished by reviewing the incumbent's related education and experience prior to County employment and related experience gained with the County. Evergreen's consultants also reviewed job descriptions, in conjunction with County Staff, to ensure that content and titles were current, accurate and were consistent with FLSA, EEO and ADA considerations. At the conclusion of the study, Evergreen made recommendations by individual position/employee for internal salary equity pay adjustments and provided an analysis that included a statistical treatment of pay placement and progression.

Compensation, Classification, and Benefits Study
Haywood County, North Carolina

Evergreen Solutions was retained by Haywood County to conduct a Compensation, Classification and Benefits Study. Evergreen's consultants reviewed the County's current pay grades and classification information; conducted salary and benefits surveys of the County's peers; made recommendations to update or restructure the County's pay grades and classification system; and provided revised job descriptions for the updated/restructured classification system.

Classification System and Pay Plan Development Study
Franklin County, North Carolina

Evergreen Solutions was retained by Franklin County to conduct a Classification System and Pay Plan Development Study. The Evergreen Team worked with the County to obtain the current classification system and pay plans. After an initial assessment, Evergreen consultants collected data using the Job Assessment Tool© and conducted market salary and benefits surveys to develop recommendations regarding strategic positioning, a new job classification, and compensation and position evaluation system based on analyses of the data gathered. **Note:** Evergreen was also hired to conduct a Performance Evaluation Study.

Classification and Compensation Study
Dare County, North Carolina

Evergreen Solutions was engaged with Dare County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a comprehensive evaluation of every job to determine relative worth within the County (internal equity), placement in the organizational structure, and to establishment appropriate pay ranges. Evergreen further established appropriate benchmarking standards to include a comparison and analysis of salaries and benefits of like or similar jobs (external equity) of comparable local governments and private employers in various markets for which the County competed for labor supply.

Classification and Total Compensation Study
Ashe County, North Carolina

Evergreen Solutions was retained by Ashe County to conduct a Classification and Total Compensation Study. Evergreen performed the following tasks: reviewed the existing classification plan and related job descriptions; conducted a salary study that included public and private employers who were providing comparable services; prepared recommendations for compensation policies, including cost of living increases, career ladders, certification incentives, to ensure internal pay equity; and examined and compared benefits in relation to other local governments.

Classification and Compensation Study
Onslow County, North Carolina

Evergreen was retained by Onslow County to conduct a Classification and Compensation Study. Evergreen provided an updated market study of comparable entities, evaluated the current compensation and classification, performed a pay compression analysis of all County positions, and developed policy recommendations for the administration and maintenance of the classification and compensation system.

Compensation Strategy Review and Classification Study
Town of Clayton, North Carolina

Evergreen Solutions was engaged with the Town of Clayton to conduct a Compensation Strategy Review and Classification Study. The focus for this project was internal equity and correcting salary compression where it existed, as well as an external market benchmarking/analysis. Recommendations included a review of the current classification system taking into account changes in Federal and State laws in order to provide for legally defensible classification specifications (essential job functions, FLSA, especially exempt/non-exempt status). Evergreen's consultants identified and recommended career pathing, as well as established recommended titling guidelines based on rules incorporating organizational hierarchy. **Note:** Evergreen was again retained in 2022 to conduct an Organizational/

Staffing Study for the Town. Evergreen was also hired in 2024 to conduct a Compensation Plan Update.

Classification and Compensation Study
Town of Huntersville, North Carolina

Evergreen Solutions was retained by the Town of Huntersville to conduct a Classification and Compensation Study. Evergreen performed the following tasks:

- conducted a comprehensive evaluation of every job classification to include job surveys, individual employee interviews or interviews within similar work groups;
- analyzed data and follow-up with employees and/or supervisors to clarify any concerns;
- made initial recommendation to HR Director, Town Management and Department Directors for any changes to existing positions and overall classification plan;
- based on initial recommendations and feedback, conducted any follow-up meetings and drafted a classification plan and specifications;
- reviewed and updated job descriptions to ensure that content and titles were current, accurate and consistent with job analysis and all relevant federal and state statutes;
- identified the benchmark positions and any specialized positions from each classification to survey;
- determined a relevant job market with town management to include surrounding and comparable municipalities and private sector as appropriate;
- conducted salary survey that include salary ranges, pay incentives, and benefits;
- analyzed survey data analysis and recommend pay structures (grades/classification groups and pay ranges);
- reviewed the impact on current employees for pay adjustments based on the recommended structure and existing/resulting compression adjustments;
- developed adjustment strategies and cost scenarios which included a short and long term strategy; and
- provided recommendations to HR Director and Town Management for pay structures and related pay adjustments.

Employee Compensation Study
City of Beaufort, South Carolina

Evergreen Solutions was engaged with the City of Beaufort to conduct an Employee Compensation Study. Evergreen's consultants: provided a comprehensive evaluation of every job within the City to determine relative worth within the organization for internal equity; established appropriate benchmarking standards and conducted salary analysis as needed for similar positions with comparable South Carolina municipalities; recommended salary range for each position based on the compensation survey results and established step progressions within the ranges; prepared a new salary structure based on the results of the survey and best practices; identified potential or existing pay compression issues and provided solutions; identified any extreme individual or group compensation inequities and provided a recommended corrective action plan and process to remedy deviations; analyzed and recommend changes to the present compensation structure to meet market analysis; and recommended implementation strategies for compensation practices, based on market demands, including pay for performance, skill pay, certification/education compensation, special assignment compensation, bilingual pay, promotional pay, and acting assignment pay.

Wage and Compensation Study
City of Folly Beach, South Carolina

Evergreen Solutions was retained by the City of Folly Beach to conduct a Wage and Compensation Study. The primary objectives of the study were to: ensure fair and equitable compensation relationships within the City; provide competitiveness with the external market; provide clear guidance on progression within identified ranges; and provided implementation strategies and priorities moving forward.

Employee Compensation and Classification Study
City of Greenwood, South Carolina

Evergreen Solutions was retained by the City of Greenwood to conduct an Employee Compensation and Classification Study. Evergreen's consultants evaluated the City's current market position by comparing the City to other organizations, and provided recommendations on a phased implementation approach for recommendations. Evergreen's consultants further assisted the City in determining creative strategies to attract and retain a qualified workforce.

Classification, Compensation and Benefits Study (Included a Staffing Study)
City of Clemson, South Carolina

Evergreen Solutions was retained by the City of Clemson to conduct a Classification and Compensation Study and Staffing Study. Evergreen reviewed the existing classification and compensation plan to ensure that all positions within the City were internally equitable and externally competitive. The objectives of the study were to: have a creditable Classification and Compensation Plan that ensured positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills and abilities were classified together; provide salaries commensurate with assigned duties and provides recognizable compensational growth; and provide justifiable pay differential between individual classes and maintains currency with relevant labor markets. The end product of the study included recommendations for a classification schedule, job descriptions, a wage comparison with comparable cities/towns and a compensation plan.

The Staffing Study documented and reviewed existing operations of the City through a collection of Key Performance Indicators (KPIs) and other outcome-related data. Evergreen developed and collected the staffing and outcome survey and analyzed peer data to determine the relevant staffing range for each department/function, service, and level. Evergreen reviewed the results collected and developed recommendations that identified all gaps between the current and desired staffing by level and functional area of the City.

Classification and Compensation Study
City of Mauldin, South Carolina

Evergreen Solutions was retained in 2023 by the City of Mauldin to conduct a Classification and Compensation Study. Evergreen recommended the assignment of each position within the classification structure using a standardized rating system that analyzed each position against multiple evaluation criteria and conducted a comprehensive benchmark market analysis of all City positions with comparable and surrounding (regional) jurisdictions, institutions of higher education, and applicable private/public sector competitors. **Note:** Evergreen previously conducted a similar study for the City.

Compensation Study
City of Pickens, South Carolina

Evergreen was hired by the City of Pickens to conduct a Compensation Study. Evergreen conducted a comprehensive preliminary evaluation of the existing compensation plan(s) for the City; identified positions to benchmark; identified a comprehensive list of targets; conducted a market salary assessment; developed a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement; slotted classifications into the revised or new pay scale; and developed recommendations for a maintenance program.

Classification and Compensation Study
City of Lancaster, South Carolina

Evergreen Solutions was retained by the City of Lancaster 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. **Note:** Evergreen previously conducted a similar study for the City.

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

Evergreen Solutions was retained by the City of Columbia to conduct a comprehensive evaluation of the City's current compensation and classification structure for its 2,352 employees. The primary objective of the study was to determine whether the City's current pay structure, policies, and practices were effective as compared to peer organizations or whether future adjustments were needed. Evergreen's consultants conducted a job-task analysis/job audit of all employee positions to verify and validate information from existing job descriptions. Based on the data collected, Evergreen defined the essential functions of the job class, including, required education, experience, knowledge, skills, and abilities, to ensure compliance with ADA regulations; identified discrepancies between existing and proposed classifications; reported areas that were understaffed or under-utilized; identified management, supervisory, professional, technical and general employees, including each employee's FLSA status (exempt/non-exempt); evaluated and recommended other programs that could be implemented by the City to attract candidates for hard-to-recruit positions; and developed a tool that the City could utilize to evaluate and process future reclassifications.

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

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

In the end, Evergreen provided recommendations to the classification and compensation structure along with associated costs or savings of implementing those recommendations. Evergreen also provided training/education presentations to managers and senior management staff to ensure that there was an understanding and commitment to the new classification and compensation system. **Note:** Evergreen Solutions was again hired in 2022 to conduct a Compensation Study.

Classification, Compensation, and Time Use Study
Oconee County, South Carolina

Evergreen was retained by the Oconee County to conduct a Classification, Compensation, and Time Use Study. Evergreen performed the following services: provided for a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and for the establishment of pay ranges and progressions within the ranges; reviewed all current job classifications, confirm, and recommended changes to hierarchical order of jobs using proposed evaluation system; recommended revision of policies and procedures related to compensation; established appropriate benchmarking standards and conducted a salary survey for similar positions with comparable municipalities as required; identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation structure to meet market analysis. This included recommendations for individual positions; evaluated how employees allocated their time during working hours and identified where time may be wasted or where productivity could be enhanced; provided recommendations for guidelines, vehicles and tools for classification and compensation structure. Evergreen further designed guidelines for progression within job classifications; outlined transition strategy and develop strategies for maintaining internal equity and market competitiveness over time; and assisted the County in assessing financial impacts to achieve market parity and potential inequities.

Classification and Compensation Study Services
Beaufort County, South Carolina

Evergreen Solutions was engaged with Beaufort County to provide Classification and Compensation Study Services. The purpose of the study was to address changes in county operations and staffing over the past decades, which may have affected the type, scope, and level of work being performed. The objectives of the study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; clearly outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differentials between individual classes; and maintain a competitive position with other comparable governmental entities and private employers within the same geographic area.

Classification and Compensation Study Services
Dillon County, South Carolina

Evergreen Solutions was retained by Dillon County to provide Classification and Compensation Study Services. Evergreen performed the following tasks: provided for a comprehensive evaluation of every job to determine relative worth within the County for internal equity and for the establishment of pay ranges and step progressions within the ranges; reviewed all current job classifications, confirmed, and recommended changes to hierarchical order of jobs using Evergreen's evaluation system; established appropriate benchmarking standards and conducted a salary survey for similar positions with comparable South Carolina jurisdictions; identified potential pay compression issues and provided potential solutions; and analyzed and recommended changes to the present compensation structure to meet market analysis.

Compensation and Classification Study
Greenwood County, South Carolina

Evergreen Solutions was retained by Greenwood County to conduct a Compensation and Classification Study. Evergreen performed the following tasks: reviewed and evaluated each pay grade for accuracy and recommended necessary updates; provided a comprehensive evaluation of each job within the County, based on the current job description, to determine relative worth within the organization for internal equity and the establishment of pay grades; reviewed all current job descriptions, confirmed, and recommended changes to the hierarchical order of jobs using Evergreen's evaluation system; established proper benchmarking standards and conducted salary surveys for similar positions within the State of South Carolina; identified potential pay compression issues and provide potential solutions; and analyzed and recommended changes to the present compensation structure to meet market analysis.

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.

Note: Evergreen Solutions was again retained in 2016 to assist Charleston County with conducting comprehensive market analysis using selected benchmarks. A market survey was conducted to determine the external equity of the County against its peers.

Note: Most recently, Evergreen was hired in 2021 by Charleston County to conduct a Compensation Study. A market survey was conducted to determine the external equity of the County against its peers.

Classification and Compensation Study
Berkeley County, South Carolina

Evergreen Solutions was retained by Berkeley County to conduct a Classification and Compensation Study for 1,153 employees. Evergreen's consultants reviewed the County's current classification and compensation plan and recommended a consistent and competitive market position that the County could maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the County based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Pay and Classification Study
Dorchester County, South Carolina

Evergreen Solutions was retained by Dorchester County Government to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the County. As part of the study, Evergreen conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the County. Finally, a detailed plan was developed to provide the County with specific steps to implement an equitable and competitive compensation and classification plan.

Note: Evergreen was again hired in 2020 to conduct a Compensation Plan Update.

Classification and Compensation Study
Pickens County, South Carolina

Evergreen was retained by Pickens County to conduct a Classification and Compensation Study for 800 employees. Evergreen performed the following tasks: provided a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and to establish of pay ranges and progressions within the ranges; reviewed all current job classifications and recommended changes to hierarchical order of jobs using Evergreen's evaluation system; established appropriate benchmarking standards and conducted a salary survey with comparable local governments and private employers as required; identified potential pay compression issues and provided solutions; and analyzed and recommended changes to the County's compensation structure to meet market analysis.

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

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

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

Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future merit allocation approaches, considering changes to classification and compensation program and limited budgets. **Note:** Evergreen was again hired in 2020 to conduct a similar study.

Pay and Classification Study
Town of Moncks Corner, South Carolina

Evergreen Solutions was engaged with the Town of Moncks Corner to conduct a Pay and Classification Study for its 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 market salary survey was issued to local and regional employers to assess market competitiveness. Based on the findings from the classification and compensation review, a new pay plan as well as policies and procedures were recommended.

Compensation Study
Town of Central, South Carolina

Evergreen was hired by the Town of Central to conduct a Compensation Study. Evergreens consultants conducted an analysis of pay against the market and prepared a summary report of the survey results in order to make recommendations for updating the Town's pay plan.

Classification and Compensation Study
City of Atlanta, Georgia

Evergreen Solutions was retained by the City of Atlanta to conduct a Classification and Compensation Study for its more than 8,000 employees. The primary objectives of the study were to: ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within similar geographic areas who are providing comparable and equivalent services.

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.

Note: Evergreen was again hired in the latter part of 2021 to conduct a Classification and Compensation Plan Update.

Compensation Analysis
City of Alpharetta, Georgia

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers' both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of the study, the City of Alpharetta employed 414 full-time and five part-time positions, excluding senior management and elected officials, defined across 132 position descriptions. The base salary ranges for these positions were divided among eight pay grades. The primary goals of this project were to: determine the City's competitive position within the marketplace in terms of its overall compensation package; determine the relative value and competitive positioning of each compensation/benefit area; and identify any weaknesses within the components of the City's existing compensation package that may negatively impact the organization's ability to attract and retain talented employees. **Note:** Evergreen was again hired by the City on 2019 to conduct a Comprehensive Pay and Classification Study.

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.

Note: In 2019 Evergreen was hired to conduct a Compensation Plan Update. More recently, Evergreen was retained in 2021 to conduct another Compensation Plan Update.

Classification and Compensation Study
City of South Fulton, Georgia

Evergreen was retained by the City of South Fulton to conduct a Classification and Compensation Study. Evergreen performed the following tasks: provided a comprehensive evaluation of every job within the City to determine relative worth within the City for internal equity and for the establishment of pay ranges and step progressions within the ranges; evaluated the feasibility of having a twenty ($20) dollar an hour minimum wage; reviewed all current job classifications, confirmed and recommended changes to the hierarchal order of jobs using the proposed evaluation system; established appropriate benchmarking standards and conducted salary surveys as needed for similar positions with comparable Georgia municipalities as required; identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the current compensation structure to meet market analysis; and evaluated and recommended appropriate compensation (salary and fringe benefits) for elected officials.

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. **Note:** In 2022, Evergreen was again hired by the City to conduct a Compensation Study.

Pay and Classification Study
City of Roswell, Georgia

Evergreen Solutions was retained by the City of Roswell to conduct a Pay and Classification Study for approximately 1,000 employees. Evergreen's consultants evaluated the City's present compensation and classification structure, as compared to the relevant job market, for comparable positions in both the public and private sectors to ensure job market competitiveness, internal equity, and fiscal responsibility. Geographic applicability, specific job comparability, and departmental structure was considered to identify peers, and a market salary survey was conducted. A report of findings and recommendations, including cost estimate to adjust employee pay for new paygrades, was presented to the City Leadership Team, and Elected Officials. **Note:** Evergreen was previously hired by the City to conduct a Salary and Benefits Survey.

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. **Note:** Evergreen was again hired by the City in 2019 to conduct a Salary Review.

Compensation Study
City of Dalton, Georgia

Evergreen was hired by the City of Dalton to conduct a Compensation Study. Evergreen conducted a salary survey to determine the City's competitiveness in the market. Based on the results of the survey, Evergreen updated to City's pay plans. **Note:** Evergreen previously conducted a Classification and Compensation Study for the City. In 2024, The City again hired Evergreen to conduct a Classification and Compensation Study.

Classification and Compensation Study and Analysis
City of Riverdale, Georgia

Evergreen was hired by the City of Riverdale to conduct a Classification and Compensation Study and Analysis. Evergreen will perform the following: provide a comprehensive evaluation of every job within the city to determine relative worth within the organization for internal equity; review all current job classifications and recommend changes to the hierarchical order of jobs; establish appropriate benchmarking standards and conduct a market salary survey; identify potential pay compression issues and provide potential solutions; analyze and recommend changes to the present compensation structure; and develop guidelines to assist City staff with determining the starting pay for new employees.

Compensation Salary Study and Survey
Forsyth County, Georgia

Evergreen Solutions was retained by Forsyth County to conduct a Compensation Salary Study and Survey. Evergreen reviewed current wage and salary plans as well as salary grade levels to understand the County's challenges in recruiting and retaining employees. Evergreen conducted salary and benefits surveys of comparable labor markets by creating and utilizing survey documents developed and designed specifically for Forsyth County Government. The surveys were designed to capture actual salary, base salary, benefits, and classification salary range information to ensure that the County's salaries and classification salary ranges were competitive with other public organizations in the greater metro Atlanta labor market based upon 2019 cost of living projections and market influences. Evergreen worked with the Executive Team to identify the comparable labor markets, including both public sector, utility agency, and private sector employers, for the compensation survey.

Evergreen prepared a detailed report of findings, written recommendations, and associated implementation costs for the following: specific benchmark classifications, any classification salary range adjustments, and other salary components, which impact the County's competitive position. All findings included 2018 findings/costs and projected 2019 market influences, cost of living, and any other relevant impacting factors deemed important. **Note:** Evergreen previously conducted a Compensation and Benefits Study for the County.

Classification and Compensation Study
DeKalb County, Georgia

Evergreen was hired by DeKalb County to conduct a Classification and Compensation Study. The primary objectives of the study are to: develop and implement a modern, equitable, legally defensible, and competitive compensation system to increase employee value proposition; develop a streamlined and consistent classification system that promotes equity and clarity across all departments; establish a competitive salary structure that reflects current market conditions and supports the County's ability to attract and retain a highly skilled workforce; enhance opportunities for employee growth by defining clear career pathways and promotional opportunities; address pay compression and other disparities to foster a fair and productive work environment; ensure compliance with all relevant federal, state, and local regulations to maintain a legally defensible compensation framework; design a compensation structure that balances competitiveness with fiscal responsibility and sustainability to support long-term organizational objectives; conduct a thorough analysis of the County's current job classifications and compensation structures to identify areas for improvement; develop a comprehensive job evaluation system that considers factors such as job complexity, required skills, and responsibilities; provide recommendations for a transparent and adaptable compensation system that aligns with industry best practices; and establish mechanisms for ongoing evaluation and updates to the classification and compensation systems to ensure continued relevance and competitiveness.

Classification Study
Cherokee County, Georgia

Evergreen Solutions was retained Cherokee County to conduct a Classification Study. Evergreen conducted a job analysis by collecting a Job Assessment Tool from employees to determine the appropriate hierarchy of jobs to ensure internal equity within the County and reviewed and revised job descriptions as needed. **Note:** Evergreen previously conducted a compensation study in 2022 and a compensation and benefits study in 2018.

Classification and Compensation Study and Analysis
Columbus Consolidated Government, Georgia

Evergreen Solutions was engaged with Columbus Consolidated Government to conduct a Classification and Compensation Study and Analysis for its more than 3,000 employees. Columbus is Georgia's first consolidated city/county government, the second largest city in Georgia and is a recognized leader among its peer cities, and takes pride in its operational efficiency and the excellent quality of life it fosters.

Evergreen conducted an external market analysis to determine whether the City was competitive with its peers. Evergreen worked with Human Resources and City leadership to review its classification and compensation structure and recommended comparable public and private survey markets. Evergreen considered the compensation and benefits package received by employees with the City as it related to both the external and internal markets. The City's objectives for this study were to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic areas.

Compensation and Pay Classification Plan Study
City of Foley, Alabama

Evergreen Solutions was retained by the City of Foley to conduct a Compensation and Pay Classification Plan Study. The objectives of the study were to conduct and implement a total compensation plan (including benefits) structure for the City's workforce which would provide both internal and external equity, establish a classification system that accurately describes the duties, knowledge, skills, abilities and minimum qualifications required for each job class, determine and implement a program of accurate job descriptions based on job analysis, and develop a maintenance program for job descriptions and classification recommendations.

Evergreen conducted a wage and benefit survey among competing jurisdictions as well as public and private organizations to determine competitive wages in the appropriate labor market(s). Using the survey results, Evergreen assigned each job to a pay grade with a view toward achieving proper internal relationships among classes and making salary ranges competitive with relevant markets with due consideration of the financial condition of the City. Evergreen provided estimates of the cost to install and implement the new pay plan and recommended a methodology for implementation. **Note:** Evergreen was again hired in 2022 to conduct a similar study for the City.

Classification and Compensation Study
City of Auburn, Alabama

Evergreen Solutions was retained by the City of Auburn to conduct a Classification and Compensation Study for its 1,200 employees. Evergreen conducted a job analysis to determine internal equity and conducted a salary survey to determine whether the City's salaries were competitive in the market. Evergreen also reviewed and updated job descriptions, as needed.

Compensation and Benefits Study
City of Mobile, Alabama

Evergreen Solutions was retained by the City of Mobile to conduct a Compensation and Benefits Study for its 1,100 employees. Evergreen's consultants surveyed the market to determine the City's market position and competitiveness with its peers as it related to compensation and benefits.

Classification and Compensation Study
Baldwin County, Alabama

Evergreen Solutions was retained by Baldwin County to conduct a Comprehensive Classification and Compensation Study. Evergreen consultants conducted a job analysis, evaluated and revised job descriptions, conducted a market salary and benefits survey, developed a new pay plan based on the market results and job analysis, and prepared and presented a final report that recommended a new classification and compensation structure for the County.

Compensation, Pay and Benefits Study
Lee County Commission, Alabama

Evergreen Solutions was retained by the Lee County Commission to conduct a Classification, Pay and Benefits Study for approximately 436 employees. To begin this study, Evergreen Solutions conducted a comprehensive, preliminary evaluation of the County's current pay scale and existing classification plan. Evergreen used its unique Job Assessment Tool© (JAT) to identify classifications of positions and perform job analyses, including an evaluation of supervisory comments. Follow-up interviews were conducted, as needed, and classification changes recommended.

Benchmarks and targets were identified for a market salary and benefits survey. Survey data and internal equity (with proper consideration of the financial condition of the jurisdiction), was used to determine proper pay scale, identify highly competitive positions within the County, and to make strategic positioning recommendations. Evergreen Solutions completed the study by conducting a solution analysis, developing and administering an employee appeals process, developing and submitting final reports, and recommendations for compensation administration to ensure that staff could conduct audits/adjustments consistent with study methods until the next formal study is conducted.

Compensation Study
Shelby County, Alabama

Evergreen Solutions was engaged with Shelby County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job analysis to determine the hierarchy of jobs within the County for internal equity as well as a market salary survey with comparable local and private sector employers to determine external equity. Evergreen further reviewed and updated job descriptions.

Classification and Compensation Study
City of Miami Beach, Florida

Evergreen Solutions was retained by the City of Miami Beach to conduct a Compensation and Classification Study for its 3,165 employees. Evergreen worked with the City to identify comparable cities and public sector organizations in South Florida to review the effectiveness of the City's current salary plan as it related to market competitiveness for attracting and retaining quality employees. The study was conducted in two phases. Phase 1 consisted of 300 positions (i.e., classifications) and Phase 2 also consisted of 300 positions. Therefore, only those employees that were covered by the 300 positions were included in each phase of the study.

Classification and Compensation Study Services
City of North Miami Beach, Florida

Evergreen Solutions was retained by the City of North Miami Beach to provide Classification and Compensation Study Services to the Water Department. Evergreen worked with the City to: determine the classifications to include in the job analysis; reviewed the proposed organizational chart; linked proposed classifications to any current classifications; interviewed current water department leadership; documented specific classification challenges; selected peers class specifications to position creation; developed draft class specifications; assembled secondary data on classification plan ranges; determined the average actual compensation for classifications; slotted all classifications into the relevant pay plan; and estimated the cost to hire. **Note:** In 2021, Evergreen was hired to conduct a Classification and Compensation Study. Most recently, Evergreen was hired in 2023 to assess the cost of vacancies in the City.

Classification and Compensation Study
City of Fort Myers, Florida

Evergreen Solutions was hired 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) consisting of 1,082 employees. The study will include 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 will also be conducted. The project will conclude 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. **Note:** Evergreen was again hired in 2020 to conduct a Compensation Study for the City as well as a Staffing Study of the Police Department.

Classification and Compensation Study and Staffing Study
City of Pensacola, Florida

Evergreen Solutions was retained by the City of Pensacola to conduct a Classification and Compensation Study as well as a Staffing Study. For the staffing study Evergreen's consultants surveyed key staff and stakeholders to validate strategic needs and service areas, clarified duties and responsibilities, documented current functional areas, summarized major programs, answered specific questions regarding departmental organization and operations of the City to assure a valid understanding of the City; assigned functional areas and major programs to the specific strategic needs and service areas and weighted the allocated resources. Evergreen further identified jobs by level that fell outside of the estimated staffing thresholds; developed staffing model based on current strategic needs and peer thresholds; prepared summary of findings to the HR team; and identified areas needing improvement. **Note:** In 2019, Evergreen conducted a Compensation Study for the City.

Classification and Compensation Study
City of Clearwater, Florida

Evergreen Solutions was retained by the City of Clearwater to conduct a Classification and Compensation Study for 1,882 employees. Evergreen's consultants reviewed and evaluated existing classification/compensation system and benefits structures; developed a new methodology for pay structures and guidelines to address internal equity and external competitiveness (a salary survey or market study of benchmark jobs against comparable positions in other governments and relevant industries); and prepared updated pay plan schedules.

Classification and Compensation Study
City of Orlando, Florida

Evergreen was hired in 2024 by the City of Orlando to conduct a Classification and Compensation Study of its more than 4,500 employees. Evergreen will examine internal equity to ensure that all positions are classification properly and that employees doing similar work are on the proper pay scale and will examine external equity to determine whether the City's salaries are competitive. Based on the results of the job analysis, Evergreen will update all job descriptions and the City's pay plans. **Note:** Evergreen previously worked with the City on more than five occasions providing a variety of human resource consulting, including compensation studies for various employee groups.

Compensation Study
City of Boca Raton, Florida

Evergreen was hired by City of Boca Raton to conduct a Compensation Study. Evergreen will conduct a comprehensive market-based survey and analysis of the City's current salary ranges and employee compensation for its 1,550 employees. Evergreen will also produce a pay plan for the City, develop strategic positioning recommendations and opportunities, and provide options to address salary progression and compression considering internal and external equity, and ensuring competitiveness within the market. Evergreen will prepare an implementation strategy and cost analysis for the pay plan and compensation recommendations.

Compensation, Classification, and Performance Management Study
Manatee County, Florida

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement.

Compensation and Classification Study Services
Monroe County, Florida

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

Recommendations were provided to improve fairness and equity of all jobs within the County. Select County staff were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished. **Note:** Evergreen was again retained in 2018 to conduct an update of the County's Classification and Compensation Plan to include fire and rescue. Most recently, Evergreen was retained in 2022 to conduct a Compensation Study.

Compensation Study
Orange County, Florida

Evergreen Solutions was retained by Orange County to conduct a Compensation Study for non-represented staff. Evergreen's consultants conducted a salary survey to determine the County's market position and prepared a final report with cost analysis for implementation of all recommendations.

Classification and Compensation Study
Palm Beach County, Florida

Evergreen Solutions was retained by Palm Beach County to conduct a Classification and Compensation Study, for more than 7,000 employees, in order to update the County's current classification and compensation structure. Evergreen performed the following tasks:

- conducted a job analysis across the County to ensure job descriptions matched the duties performed by the employee;
- provided an analysis of all positions' assigning an appropriate salary grade to ensure fairness and equity and included recommendations for all positions that were found to be above or below the assigned salary grade; and
- conducted a market compensation analysis of salaries and wages of like or similar jobs of comparable Florida public organizations with similar position and organizational characteristics.

Classification and Compensation Study
Pinellas County, Florida

Evergreen Solutions was retained by Pinellas County to conduct a comprehensive classification and compensation study for 3,100 employees that included recommendations and suggestions for an implementation and maintenance process that effectively provided the County with the resources and expertise to further enhance its classification and compensation program. A comprehensive job classification and pay study hadn't been conducted since 2004 so the County believed it was important to invest in a study that would look at both internal and external equity.

The objective of the study was to have a credible classification and compensation plan that: allowed positions performing similar work with similar levels of complexity, responsibility, and knowledge, skills and abilities to be classified appropriately; identified salaries for assigned duties; outlined promotional opportunities and possible compensation growth; identified pay differential between individual classifications; and identified relevant labor markets.

Classification and Compensation Study Analysis
Suwannee County, Florida

Evergreen was hired by Suwannee County to conduct a Classification and Compensation Study Analysis. Evergreen will perform the following tasks: provide a comprehensive evaluation of every job in the County; establish appropriate benchmarking standard and conduct salary surveys; analyze and recommend changes to the present compensation structure to meet market analysis; update job descriptions; recommend and identify a consistent and competitive market position; conduct a compression analysis to include any recommendations for implementation; and conduct a training program for the Human Resources staff.

Employee Classification and Compensation Study
City of Hot Springs, Arkansas

Evergreen Solutions was retained by the City of Hot Springs to conduct an Employee Classification and Compensation Study. Evergreen performed the following services:

- updated job descriptions to match distinguishing characteristics, essential job functions, minimum qualifications (knowledge, education, experience, skills, and abilities), working conditions (physical demands, work environment, other relevant circumstances.), and certifications and licenses.
- ensured the updated job descriptions were internally equitable and externally competitive;
- created new job descriptions where needed that were accurate and consistent with Fair Labor Standards Act (FLSA), Equal Employment Opportunity (EEO), and American with Disabilities Act (ADA) considerations;
- reviewed the wage, grade pay plan, provided feedback, and suggestions on modifications that were in line with the objectives outlined above;
- conducted a comprehensive base salary and benefits survey. The survey included benchmarking local market public sector jobs within the same essential duties and functions;
- provided a spreadsheet of all comparable cities based on a combination of factors including, resident population, geographic size, budget, and scope of city services;
- recommended an appropriate salary range for each position based on the classification plan, internal relationships, and equity; and
- identified potential pay compression issues and provided possible solutions.

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. **Note:** Evergreen Solutions was again retained by the City of Seguin in 2023 to conduct a Compensation Benchmarking and Structure Analysis. Evergreen examined the City's salaries against the market and provided recommendations to allow the City to be more competitive in recruiting and retaining talented employees.

Classification and Compensation Study and Staffing Analysis
City of Harlingen, Texas

Evergreen Solutions was retained by the City of Harlingen to conduct a Classification and Compensation Study and a Staffing Analysis. Evergreen's consultants performed the following tasks:

- conducted a comprehensive evaluation of every job class within the City to establish appropriate classification and pay grade assignments as well as pay ranges and step progressions within the ranges;
- conducted a compensation survey of the market including comparable Texas municipalities, and, appropriate private sector competitive employers;
- prepared a new salary structure based on the results of the survey and best practice research;
- analyzed and recommended changes to the present compensation structure to meet market analysis;
- reviewed current compensation plan (salary grade levels and steps) to better understand current challenges in recruiting and retaining employees;
- recommended and identified a consistent and competitive market position that the City could strive to maintain;
- recommended appropriate salary range for each position based on the proposed classification plan, the compensation survey results, internal equity and external parity;
- reviewed staffing levels and make recommendations;

- prepared a new salary structure based on the results of the survey and best practices;
- recommended implementation strategies including calculating the cost of implementing the plan;
- identified any extreme current individual or group compensation inequities and provided a recommended corrective action plan and process to remedy these situations;
- recommended and provided implementation strategies related to other key compensation practices, based on market demands; and
- presented findings and recommendations to City Administration as well as the Harlingen City Commission at a regularly scheduled commission meeting.

Classification and Compensation Study
City of Farmers Branch, Texas

Evergreen Solutions was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive. In addition to the salary survey, Evergreen Solutions conducted a benefits survey of market peers in order to compare the City's current benefits to those of its peers.

Classification and Compensation Study
City of Pflugerville, Texas

Evergreen Solutions was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman).

Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost analysis for positions that would require adjustments.

Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1st and 3rd quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval.

Comprehensive Compensation and Benefits Study
City of Rowlett, Texas

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include "on call" pay. Evergreen's consultants identified any weaknesses within the components of the City's existing compensation package that would negatively impact the organization's ability to attract and retain talented employees.

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. **Note:** Evergreen was again retained in 2022 to conduct a Compensation Study for the City.

A Classification and Compensation Pay Plan
City of Amarillo, Texas

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan for 2,835 employees. Evergreen's consultants: reviewed the City's existing classification/ compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade. In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.

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 their increasing contributions in support of the City. Evergreen consultant's gathered actual salary data from market surveys, local governmental agencies, benchmarked cities, and other appropriate data, as deemed necessary. The recommended compensation structure included a proposed training/career progression plan, including documentation as appropriate, and a plan that rewards employee performance fairly and equitably, with measures that can be documented. **Note:** Evergreen was again hired in 2020 to conduct a Market Salary Update. Most recently, Evergreen was hired in 2023 to conduct a Compensation Study.

Classification and Compensation Study
City of Lockhart, Texas

Evergreen Solutions was retained by the City of Lockhart to conduct a classification and compensation study 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 as well as benefits 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 Classification Study
City of Denton, Texas

Evergreen Solutions was retained by the City of Denton to conduct a Compensation and Classification Study for its 1,542 employees. Evergreen worked with the City to develop a communication strategy and plan that allowed the City to be informed and be as transparent as possible and met and solicited feedback and input from different levels of the City including employees, department directors/managers, and executive management.

Evergreen conducted a comprehensive market compensation study and provided recommendations to ensure that the City's compensation system supports the City's mission, strategic objectives, and compensation philosophy. Evergreen further conducted a job analysis for up to 50 positions of concern to ensure appropriate pay grade classification and address internal equity concerns and will evaluate current pay grades, e.g. number of pay grades, including additions, deletions, and/or consolidations; appropriate spread between minimum and maximum of pay ranges, and recommend a strategy for improvements. Evergreen reviewed and recommended solutions for a pay for performance system/process.

Classification, Compensation, and Benefits Study
City of Portland, Texas

Evergreen Solutions was engaged with the City of Portland (City) to conduct a Classification, Compensation and Benefits Study. Evergreen's consultants evaluated jobs within the City and the current pay and benefits structure. A market survey of salary and benefits was conducted among peers approved by the City. Based on the survey results, Evergreen made recommendations for changes to the current classification and compensation system, as well as provided a maintenance tool that the Human Resources Department to use to keep the system current and equitable. Training on this maintenance tool was also provided. **Note:** Evergreen was again hired in 2024 to conduct a Compensation Plan Update.

Compensation and Classification Study
City of Beaumont, Texas

Evergreen Solutions was retained by the City of Beaumont to conduct a Compensation and Classification Study for its 1,295 employees. Evergreen examined internal equity to determine whether positions were properly classified as well as external equity to determine whether the City was competitive in the market.

Classification and Compensation Study
City of Kingsville, Texas

Evergreen Solutions was retained by the City of Kingsville to conduct a Classification and Compensation Study for 1,172 employees. Evergreen conducted a market salary survey and job analysis to determine internal and external equity and updated the City's personnel manual.

Compensation and Classification Study
City of Coppell, Texas

Evergreen Solutions was engaged with the City of Coppell to conduct a Compensation and Classification Study. Evergreen reviewed existing job functions by position as they pertained to the current and recommended structure; examined current market position using peer comparisons; developed a comprehensive labor market salary survey for the North Texas region that included other local municipalities; analyzed existing internal hierarchy based on job relationships and essential functions, identified problem areas within the internal hierarchy system and proposed implementation methods to correct identified problems; developed a pay plan; reviewed and recommended assignments of all positions to an appropriate pay grade, as well as made recommendation(s) for corresponding education and experience requirements by classification; reviewed and revised job descriptions; and recommended implementation strategies including calculating the cost of implementing the study results.

Comprehensive Compensation and Benefits Study
City of Odessa, Texas

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study for 1,140 employees. 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.

Employee Compensation Consulting Services
Fort Bend County, Texas

Evergreen was retained by Fort Bend County to provide employee compensation consulting services for its 2,800 employees. 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.

Note: Evergreen was previously hired to conduct a similar study for the County.

Compensation and Classification Study
Brazoria County, Texas

Evergreen was retained by the Brazoria County to conduct a Compensation and Classification Study. Evergreen developed a compensation program for the County, evaluated current pay grades, and developed a classification system to facilitate the ongoing compensation analysis. Evergreen assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen then developed multiple alternative recommendations and a communication plan. Finally, Evergreen reviewed and developed different policies procedures and proposed different recommendations. Note: Evergreen was again hired in 2025 to provide Salary Survey Consultant Services.

Classification and Compensation Study
Burnet County, Texas

Evergreen Solutions was retained by Burnet County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job analysis to determine the appropriate classification structure for the County and conducted an external salary survey to determine the County's competitiveness with peer organizations in the labor market.

Salary Compensation Study
Hood County, Texas

Evergreen Solutions was engaged with Hood County to provide an update of their classification and compensation system. Evergreen evaluated the current system, collected and reviewed current environment data, and evaluated and built the projected classification plan. Evergreen identified a list of market survey benchmarks and conducted a market survey. Evergreen's consultants provided the County with the external assessment summary, developed strategic positioning recommendations, and developed and submitted draft and final reports and recommendations for compensation administration. Additionally, Evergreen updated and rewrote job descriptions, as necessary, based on our recommendations.

Classification and Compensation Study
Blanco County, Texas

Evergreen Solutions was retained by Blanco County to conduct a Classification and Compensation Study. Evergreen's consultant conducted a job analysis to determine the proper hierarchy of jobs within the County; conducted a salary survey and analysis to determine competitive market rates; updated job descriptions; and prepared a final report with cost analysis for implementation of all recommendations.

Classification and Compensation Study
Town of Prosper, Texas

Evergreen was hired by the Town of Prosper to conduct a Classification and Compensation Study. Evergreen will perform the following tasks: review existing job classifications, and related background information, and propose recommended strategies for the Town; classify benchmark jobs and slot remaining jobs in appropriate classifications; review the current compensation plan; develop and conduct a comprehensive compensation and benefits survey; recommend implementation strategies to the Town; conduct a compression analysis to include any recommendations for implementation; and conduct a comprehensive training program for Human Resources staff to ensure that the staff can explain and administer the new system in the future.

Comprehensive Compensation and Classification Study
City of Santa Fe, New Mexico

Evergreen Solutions was engaged by the City of Santa Fe to conduct a comprehensive compensation and classification study for all City 1,326 employees, including non-bargaining employees and those covered by collective bargaining agreements. Evergreen conducted orientations and focus groups with general employees, and interviewed department directors and other executive managers. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations as needed for revisions to the current classification structure.

Evergreen also worked with City Human Resources staff to conduct a comprehensive salary survey. The results were combined with the internal hierarchy analysis to generate recommendations for a comprehensive compensation and classification structure. Evergreen provided detailed recommendations for the implementation of a new structure and related employee salary adjustments. Evergreen also assisted the City with implementation of a revised performance assessment system which include training with supervisors and staff, and creating and distributing performance appraisal factor weighting forms. **Note:** Evergreen was again hired in 2023 to conduct a similar study for the City.

Classification and Compensation Consulting Services
City of Albuquerque, New Mexico

Evergreen Solutions was retained by the City of Albuquerque to provide Classification and Compensation Consulting Services for 6,500 employees. Evergreen's consultants performed the following tasks:

- developed new classification and compensation structure (job families, pay plans, grades, steps as applicable) including recommendations for movement within structure;
- conducted a benchmarking analysis for placement of jobs within the new structure;
- assessed and provided recommendations associated with Premium Pay programs including but not limited to hiring incentives, seniority-based pay (longevity pay), shift differential, etc.;
- recommended resources needed to manage compensation program into future (i.e., technology and human capital);

- reviewed and updated job descriptions to accurately reflect essential functions, minimum qualifications for education and experience, required knowledge, skills and abilities, special requirements, and physical and environmental conditions;

- ensured position descriptions were in full compliance with all applicable federal, state, local statutes and regulations, including the Fair labor Standards Act (FLSA) exemption status and Americans with Disabilities Act (ADA); and

- ensured position descriptions were assigned within the classification system, reflecting equitable placement between various position responsibilities.

Note: Evergreen also conducted a workforce study to determine the proper staffing of various departments. In addition, Evergreen previously conducted a classification and compensation study.

Salary and Benefits Survey
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 and benefits 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.

Classification Study and Compensation Survey
City of Page, Arizona

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

Classification and Compensation Study (Included a Gender Equity Analysis
City of Prescott, Arizona

The City of Prescott retained Evergreen Solutions to conduct a Classification and Compensation Study, including the development of a compensation philosophy, to design and implement a comprehensive total compensation plan and to classify all positions appropriately within the plan structure. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including salary and benefits surveys of competing organizations. The final report culminated in a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the City of Prescott. **Note:** Evergreen also ensured that the solution that was recommended was equitable from a gender standpoint by doing an analysis of the data collected. Evergreen was again hired in 2025 to conduct a PTO Survey.

Compensation Study
City of Flagstaff, Arizona

City of Flagstaff was hired Evergreen Solutions to conduct a Compensation Study for more than 1,000 employees. Evergreen's consultants performed the following tasks: evaluated the current broadband pay plan structure; evaluated the current skill-based pay plan, public safety, and general 2080 pay plan structures; conducted a market salary survey of at least five other local government and private sector peer organizations; developed a plan for the City's strategic improvement, including the identification of highly competitive positions within the City; and developed recommendations and guidelines for the continued administration and maintenance of the compensation system.

Classification, Compensation, and Benefits Study
Yavapai County, Arizona

Evergreen Solutions was engaged with Yavapai County to conduct a Classification, Compensation, and Benefits Study for its 1,750 employees. The purpose of the study was to develop a clear, equitable, consistent and competitive classification and compensation structure that fosters the retention and recruitment of qualified individuals while providing opportunities for growth and development within the County. Evergreen worked with the County to develop a compensation structure that was fair, equitable, and competitive with other local governments in the surrounding geographic market area from which the County recruits. Evergreen further worked with the County to develop a classification system that will facilitate ongoing compensation analysis and reporting based on similarly-situated employees, similar skills, qualifications, responsibilities, and pay, using job family grouping and EEO job categories. Evergreen provided the County with a tool that the HR department could use to continue that job evaluation process.

Compression Analysis and Pay Equity Study
Town of Prescott Valley, Arizona

Evergreen was hired by the Town of Prescott Valley to conduct a Compression Analysis and Pay Equity Study. Evergreen reviewed the strengths and weaknesses of the current pay plan(s) and pay practices for the Town and discussed any pay compression issues that may exist and possible solutions. Evergreen conducted an internal pay equity analysis by race and gender to ensure fairness and compliance with relevant regulations and provided findings and recommendations to the Town to correct any inequities that might exist as well as strategies for promoting fairness and equity in the Town's compensation practices.

Pay for Performance Study and Salary Survey
City of Manitou Springs, Colorado

Evergreen Solutions was retained by the City of Manitou Springs to develop a performance-based pay structure and conduct a salary survey. Evergreen made recommendations regarding enhancements needed to the City's current performance evaluation system and provided the City with a performance evaluation tool.

Compensation Study
Grand County, Colorado

Evergreen Solutions was retained by Grand County to conduct a compensation study. Evergreen performed the following tasks: reviewed current personnel practices and policies that impacted pay and performance; reviewed legal provisions and requirements, including statutory requirements that could impact the study; conferred with the County Manager, Elected Officials, Department Heads and Human Resources Director in order to review input regarding their views of compensation problems and needs, and identified specific areas of concern; reviewed County jobs in order to prepare an appropriate pay survey and fringe benefit questionnaire; prepared a survey tool that sought entry level, mid-point and maximum pay for each key class included; performed analysis of pay and benefit data provided by peer organizations; prepared recommended pay grade and range schedules and assignments to pay grades for each class of work; determined appropriate internal relationships of the classes based upon classification factors; and developed a salary schedule or schedules that met the needs of the County's compensation program and related to the County's labor market.

Compensation and Classification Study
Garfield County, Colorado

Evergreen was retained by Garfield County to conduct a Compensation and Classification Study for the County Administration's and Elected Officials' and 356 full time employees. Evergreen gave specific recommendations to Garfield County in relation to the County's market position and an implementation plan; created and administered a custom survey to provide a comprehensive review of the external labor market for identified benchmark jobs; integrated relevant survey data; provided an analysis of actual pay to the external labor market and identified the County's overall market position; revised and updated salary grade structures based on total compensation philosophy; prepared implementation options and guidance on the implementation of findings and recommendations; developed and implemented a job evaluation and classification system; provided a comprehensive review of job descriptions and an analysis of the compensable factors of the job(s); identified key job families; recommended job title consolidation; identified potential pay compression issues and provided recommendations for solutions; and prepared implementation options and guidelines on the implementation of findings and recommendations.

Classification and Compensation Study (Included Benefits Survey)
Ouray County, Colorado

Evergreen Solutions was engaged with Ouray County to conduct a Classification and Compensation study, including wages and benefits, for full-time and part-time employees of Ouray County. A job analysis was conducted using existing job descriptions to determine the best classifications for the work performed. Evergreen recommended the deletion of outdated or unnecessary jobs descriptions as well as the revision to current positions, if needed. In addition, a salary survey was conducted to ensure external market equity by comparing Ouray County to other county governments, local municipalities and local businesses as appropriate. Recommendations were provided to improve the fairness and equity in the current classification and compensation system.

Compensation Study
City of Long Beach, California

Evergreen Solutions was retained by the City of Long Beach - Long Beach Management Association to conduct a Compensation Study. Evergreen conducted a salary survey to determine whether the union positions within the City's Fleet Services Bureau were competitive in the market.

Comprehensive Classification and Compensation Study
City of Camarillo, California

Evergreen Solutions was retained by the City of Camarillo to conduct a Comprehensive Classification and Compensation Study. The study assessed the current classification schedule and pinpointed needed changes in job duties, titles, salaries, and benefits. The study also addressed the internal relationships within the organization to help determine proper equity in the classification and compensation study and also to help determine whether the existing salary and compensation schedule was competitive and consistent with comparable employers. In the end, Evergreen provided a defensible and technically sound basis for compensating employees within the City. Evergreen also evaluated the City's current pay for performance plan and provided alternative compensation recommendations, including Cost of Living Arrangement structures. Up to 10 single job audits was also conducted.

Classification and Compensation Study
City of Fresno, California

Evergreen was retained by the City of Fresno to conduct a Classification and Compensation Study. Evergreen reviewed and evaluated the City's existing classification system and compensation structure for more than 1,000 employees, surveyed fifteen agencies mutually agreed-upon between Local 39 and the City, reviewed classification specifications, salaries and other benefits, distributed and reviewed position description questionnaires and interviewed employees and management personnel, drafted and/or modified classification specifications, made recommendations on salaries, and provided overall subject matter expertise and recommendations on a classification and compensation structure that meets the City's prime objective of attracting and retaining qualified talent to classifications within this bargaining unit.

Classification and Compensation Study
City of Yucaipa, California

Evergreen Solutions was retained by the City of Yucaipa to conduct a Classification and Compensation Study. Evergreen reviewed current class specifications to ensure they were in line with current changes and requirements in the law and identified class specifications that needed to be updated to reflect current job duties and requirements of the position, including physical requirements and essential job functions that comply with the Americans with Disabilities Act (ADA). In addition, Evergreen reviewed the City's current organizational structure and provided recommendations to ensure it is efficient and effective.

Classification and Compensation Study
City of Thousand Oaks, California

Evergreen was hired to conduct a Classification and Compensation Study for the City of Thousand Oaks. The purpose of the study was to conduct a comprehensive evaluation and analysis of the City's current compensation structure and practices as the City desired a competitive, equitable, sustainable structure that would be aligned with the labor market to support the City in providing the highest levels of service to our community by attracting, retaining, and motivating a talented and dedicated workforce. Evergreen presented a Comprehensive Classification and Compensation Study Report, updated job descriptions and classifications, made salary structure adjustment recommendations and created an implementation plan outlining next steps and timelines for the City.

Comprehensive Compensation Study
City of Crescent City, California

Evergreen Solutions was hired by the City of Crescent City to conduct a Comprehensive Compensation Study. Evergreen performed a comprehensive review of the City's current compensation and classification system which included: reviewing job descriptions; identifying and making recommendations for directly comparable and competitive agencies; completing an internal salary relationship analysis; developing externally competitive and internally equitable salary recommendations for each class; and developing an implementation plan for the study results.

Consultant Services for a Study of the City's Compensation Plan and Benefits
City of Sanger, California

Evergreen Solutions was hired by the City of Sangar to provide Consultant Services for a Study of the City's Compensation Plan and Benefits. Evergreen performed the following tasks: reviewed current compensation practices and related issues; reviewed current listing of comparable cities and recommended appropriate changes as necessary; met with Department Directors; held orientation and briefing sessions with employees; recommended salary survey benchmarks; conducted an internal salary relationship analysis; provided recommendations for updating the City's classification and compensation plans; and trained City staff in the methodology used.

Classification and Compensation Study Services
City of Santa Ana, California

Evergreen was hired by the City of Santa Ana to conduct a Classification and Compensation Study for its more than 1,675 employees. Evergreen provided recommendations for updating the City's job architecture; developed compensation strategies to withstand minimum wage increases while maintaining appropriate pay differentials; created recommendations for appropriate labor markets; and prepared a plan for the ongoing internal administration and maintenance for the compensation plan.

Competency Model, Classification Analysis, & Compensation Study
City of West Hollywood, California

Evergreen was hired by the City of West Hollywood to conduct a Competency Model, Classification Analysis and a Compensation Study. Evergreen drafted a competency bank and provided the City a report and analysis of findings of the completed competency bank. Evergreen also conducted a comprehensive salary, benefits and total compensation survey of similar jobs with comparable public agencies in our labor market, reviewed the City's classification structure, surveyed comparable government agencies and provided a comparison of salary, benefits and total compensation. At the end of the study, Evergreen provided recommendations to the City's Human Resources staff and presented results.

Total Compensation Study
City of Moorpark, California

Evergreen was hired by the City of Moorpark to conduct a Total Compensation Study. The goal of this study is to ensure that employee compensation remains competitive and that recent organizational changes as well as the effects of changes in retirement and health insurance costs are taken into consideration. Evergreen will ensure that positions performing similar work with the same level of complexity, responsibility and knowledge, skills and abilities are classified together. Evergreen will also provide salaries commensurate with assigned duties, clearly outline promotional opportunities, and provide recommendations on staff alignment, reporting relationships, and organizational structure.

Classification and Compensation Study
Inyo County, California

Evergreen was retained by Inyo County to conduct a Classification and Compensation Study. Evergreen performed the following tasks: ensured the County remains competitive in the job market when compared to similar organizations throughout California; assessed classifications relative to the requirements of "Exempt" and "Non-Exempt" status pursuant to the criteria of the Fair Labor Standards Act; recommended revisions to internal total compensation relationships that were consistent, uniform, and sustainable for the County in consideration of its budget constraints; identified positions in the County for which there were no genuine comparable positions elsewhere within comparable agencies and made recommendations to determine fair compensation; provided modern job descriptions for certain positions; ensured equitable pay relative to other County positions; and provided total compensation recommendations to the County based upon internal and external total compensation relationships.

Classification and Compensation Study
Calaveras County, California

Evergreen Solutions was retained by Calaveras County to conduct a Classification and Compensation Study. Evergreen completed the following tasks: reviewed and compared current salaries of identified benchmark classifications; compared current salaries on the identified benchmark classifications; reviewed and compared the County's current benefit packages; recommended where the County salary structure should be to maintain a competitive presence, including surrounding counties, not comparable in sizes, but located in surrounded areas; and reviewed the County's internal relationships among benchmark classes and related classifications. **Note:** Evergreen previously conducted an organizational structure and staffing analysis of the Health and Human Services Agency and is currently conducting a compensation review for elected officials.

Classification and Compensation Study
City of Boulder City, Nevada

Evergreen Solutions was engaged with the City of Boulder City to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job evaluation, classification review, and developed a compensation system for all positions and job classifications in order to made recommendations regarding the appropriateness, internal equity, and external competitiveness of the City's classification and compensation plans. Evergreen developed an updated and well-structured classification system as well as classification descriptions for all positions that is legally compliant (including Fair Labor Standards Act (FLSA) and Americans with Disabilities Act (ADA) requirements), internally aligned, reflective of contemporary standards, and accurately reflected current roles, responsibilities, duties, and qualifications. The study also reviewed the City's compensation structure by conducting a market salary survey using comparator agencies. The compensation study contained specific recommendations regarding the integration of all classifications into a clear compensation structure, with the goal of developing a clearly designed, internally equitable format that is flexible for career opportunity and future growth.

Classification, Compensation, and Benefits Study
Ogden City Corporation, Utah

Evergreen Solutions was engaged with Ogden City Corporation to conduct a Classification, Compensation and Benefits Study for its 1,250 employees. The goals of this study were to ensure that job descriptions accurately reflect actual duties and maintain compensation levels that are both internally and externally equitable.
Evergreen Solutions worked with Ogden City Corporation throughout four project phases that involved:

- conducting a job analysis, including building a classification plan;
- documenting a compensation philosophy;

- reviewing and analyzing the City's total compensation plan, including a market salary and benefits survey; and
- providing a comprehensive report containing recommendations, an implementation approach, and guidelines for maintaining
- classification and compensation policy updates and changes.

Classification and Compensation and Equal Pay Study
City of Albany, Oregon

Evergreen Solutions was retained by the City of Albany to conduct a Classification and Compensation and Equal Pay Study. Evergreen's consultants reviewed current job descriptions and compensation structures to determine the need for modifications to assure external competitiveness and internal equity by performing the following tasks:

- reviewed current job descriptions to analyze knowledge, ability, education, experience, relevance, and hierarchical consistency;
- developed, distributed, and analyzed job specific questionnaires, as needed, and conducted in-person interviews of select staff to complete analysis;
- proposed, where appropriate, broad-banding of classifications, or combining classifications into a series, if beneficial to achieve alignment of similar positions;
- recommended additions, deletions, or modifications to existing classifications and made FLSA determinations (exempt or non-exempt status) for positions;
- surveyed comparator jurisdictions for both wages and total compensation;
- analyzed results and developed appropriate pay structures for City taking into account compression and internal equity;
- conducted equal pay analyses of recommended pay structures that complied with House Bill (HB) 2005 and its implementing administrative rules; and
- trained City HR staff on the methodology used to assess job classifications in order to maintain internal equity when adding, deleting, or modifying jobs in the future.

Compensation Study
City of Bend, Oregon

Evergreen Solutions was retained by the City of Bend to conduct a Compensation Study. The objectives of the study were to assist the City in conducting a compensation study for all COBEA represented classification descriptions as prescribed by guidelines; and assisted the City with conducting a compensation study for all non-represented classification descriptions.

Professional Technical and Expert Services
City of Portland, Oregon

Evergreen is retained by the City of Portland to provide Professional Technical and Expert Services for its more than 3,000 employees. Evergreen will review positions and classifications represented by a collective bargaining agreement, as well as newly represented and non-represented classifications. Evergreen will develop recommendations for the most effective classification structure, revise existing classifications and/or the creation of new ones, as well as make recommendations to align individual incumbents to the most appropriate classification. **Note:** This project is nearing completion.

Compensation and Classification Study
Columbia County, Oregon

Evergreen Solutions was retained by Columbia County to conduct a Compensation and Classification Study. Evergreen's consultants worked with the Compensation Study Committee (CoSC) to develop a compensation system for the County, evaluated current pay grades, conducted an equal pay analysis in compliance with the Oregon Equal Pay Law, and developed a classification system to facilitate the continued administration of the compensation analysis. Evergreen's consultants also assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen then developed multiple alternative recommendations and a communication plan as well as reviewed and developed different policies procedures and proposed different recommendations.

Classification and Compensation Study
City of Ridgefield, Washington

Evergreen Solutions was engaged with the City of Ridgefield to conduct a Classification and Compensation Study. The City had desired to maintain an internally and externally equitable, yet market competitive, classification and compensation plan. The City had strived to competitively recruit and retain employees who would provide the best service to the community. The City had not conducted an in-depth review of the classification and compensation structure since 2015-16 and since that time had grown from 37 to 52 FTE's, including seven (7) new classifications. In the end, Evergreen provided recommendations to update the City's classification and compensation structure in order to better retain and recruit qualified employees. **Note:** Evergreen was again hired in 2024 to conduct a Classification and Compensation Plan Update.

Job Classification Market Study
City of Bellingham, Washington

Evergreen was hired by the City of Bellingham to conduct a Job Classification Market Study. Evergreen will perform the following tasks: perform a market pay evaluation; collect salary and benefit data for a total compensation analysis and review job descriptions for al benchmark positions; perform a job analysis of all bargaining unit classifications; conduct job analysis interviews; analyze the internal pay relationship between positions; produce recommendations on strategy options for more effective management of compression issues; and develop tools and guidelines and provide necessary instruction to the City. **Note:** This project is nearing completion.

Job Analysis
City of Washougal, Washington

Evergreen Solutions was engaged with the City of Washougal to conduct a job analysis of select positions (seven) to include in the City's revised pay plan. **Note:** Evergreen continues to provide job analyses to the City on an as needed basis.

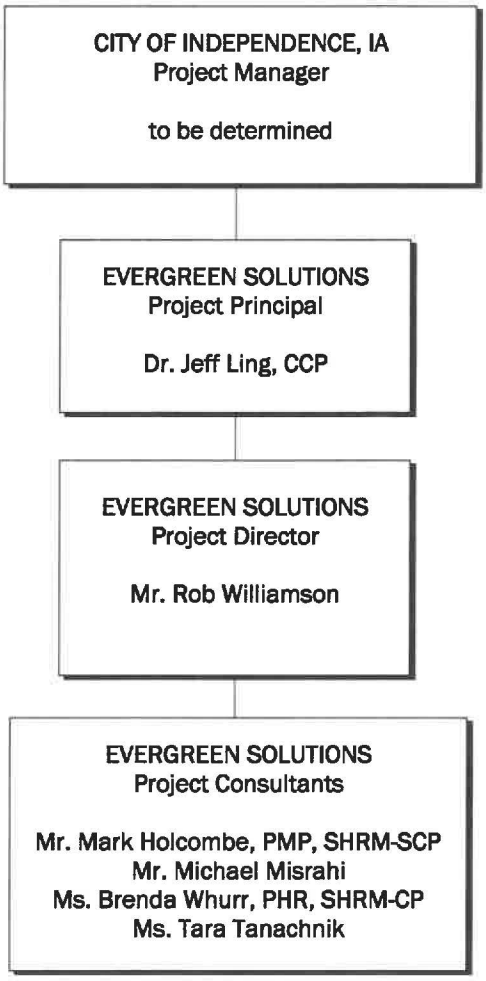
Total Compensation Study
Spokane County, Washington

Evergreen Solutions was retained by Spokane County to conduct a Total Compensation Study for more than its more than 2,000 employees. Evergreen reviewed total Compensation (compensation and benefits) for 225 regular, full-time positions and recommended possible wage adjustments that align with the County's compensation philosophy. Additionally, Evergreen compared the County's benefits package with those offered in the same local market identified in the pay analysis. **Note:** Evergreen was hired again in April of 2020 to conduct a Classification Study for the County.

B.3 Proposed Project Team

Exhibit B-2 reflects our proposed project management and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Classification and Compensation Study so that there will be no confusion as to who is responsible for any aspect of this engagement with the City of Independence.

Exhibit B-2
Proposed Project Management Organization and Personnel Assignments



City of Independence Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The City's Project Manager (CPM) will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the CPM and all project deliverables will be filtered through the CPM throughout the duration of the project.

Evergreen Solutions' Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, typically the President. The Project Principal will have contractual authority over the contract and will be our top level of project responsibility.

Evergreen Solutions' Project Director. Evergreen Solutions designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the CPM. 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 review pay plans, conduct orientation sessions and focus groups, administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT), conduct a salary and benefits survey, review and revise job descriptions, and prepare draft and final reports.

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

Key Personnel

The following paragraphs provide summaries of each team member's qualifications and experience related to his/her role in this engagement.

Project Principal
Dr. Jeff Ling, CCP

Dr. Jeff Ling is the President of Evergreen Solutions 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 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 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 1,500 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.

Project Director
Mr. Rob Williamson

Mr. Rob 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. He 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 public sector projects that Mr. Williamson has directed or been involved with include: 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 Job Classification Study and Analysis for Jefferson County, TN; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of White House, TN; a Classification and Total Compensation Study for the Town of Plainville, CT; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification, Compensation, and Benefits Study for the Town of Hanover, NH; a Classification and Total Compensation Review for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Compensation and Classification Review for the City of Cambridge, MA; an Employee Compensation Study for Livingston County, NY; a Classification and Pay Study for the City of Portland, ME; an HR Market Study for Botetourt County, VA; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for Dare County, NC; a Classification and Compensation Study for Onslow County, NC; a Classification and Compensation Study for Perquimans County, NC; a Classification and Compensation Study for the City of Burlington, NC; a Classification and Compensation Study for the City of High Point, NC; a Classification and Compensation Study for the City of Southport, NC; a Compensation Study and Pay Equity and Representative Analysis for the Town of Chapel Hill, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Compensation and Classification Study for the Town of Wendell, NC; a Classification and Compensation Study and Analysis for Darlington County, SC; Classification and Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Compensation Study for the City of Pickens, SC; a Compensation Study for the Town of Central, SC; a Classification and Compensation Study for Barrow County, GA; a Classification Study for Cherokee County, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Compensation Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for the City of Calhoun, GA; a Compensation Study for the City of Cedartown, GA; a Classification Study for the City of Clarkston, GA; a Classification and Compensation Study for the City of Dalton, GA; a Compensation Study for the City of Duluth, GA; a Salary Survey for the City of Garden City, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study and Analysis for the City

of Lawrenceville, GA; a Classification and Compensation Study and Analysis for the City of Riverdale, GA; a Compensation Study for the City of Sandersville, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Classification and Compensation Study for the City of Vienna, GA; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Classification and Compensation Study for DeSoto County, FL; a Classification and Compensation Study Analysis for Suwannee County, FL; a Compensation Study for Washington County, FL; a Classification and Compensation Study for the City of Apalachicola, FL; a Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Bradenton, FL; a Classification and Compensation Study for the City of Brooksville, FL; a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Compensation Study for the City of Miami Springs, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Naples, FL; a Compensation Study for the City of New Port Richey, FL; a Compensation Study for the City of Okeechobee, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation Study for the City of Palmetto, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Compensation Study for the City of Panama City Beach, FL; a Compensation Study for the City of Plantation, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Compensation Study for the Town of Cutler Bay, FL; a Classification and Compensation Study for the Town of Lake Hamilton, FL; a Compensation Study for the Town of Oakland, FL; a Fire Services Study for Washington County, FL; a Classification and Compensation Study for the Manatee County Sheriff's Office, FL; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for the City of Daphne, AL; a Classification and Compensation Study for the City of Madison, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Compensation Study for the City of Opelika, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for Blanco County, TX; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for the City of Del Rio, TX; a Compensation and Benefits Study for the City of Fair Oaks Ranch, TX; a Compensation/Salary Survey for the City of Freeport, TX; a Comprehensive Classification and Compensation Study for the City of Port Arthur, TX; a Classification and Compensation Study for the Town of Addison, TX; a Job Market Survey for New Braunfels Utilities, TX; a Classification, Total Compensation, and Benefits Study for the Brushy Creek Municipal Utility District, TX; a Compensation, Benefits, Pay-Practices, and Classification Study and Analysis for Upper Trinity Water District, TX; a Compensation Study for the Woodlands Water, TX; a Comprehensive Classification and Compensation Study for the South Texas Water Authority; a Salary Analysis for Fort Worth Housing Solutions, TX; a Compensation and Benefits Study for the Middle Rio Grande Conservancy District, NM; a Compensation Study for the Colorado River Water Conservation District, CO; a Total Compensation and Benefits Study for Calaveras County Water District, CA; a Classification and Compensation Study for the West Basin Municipal Water District, CA;

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.

Project Consultant
Mr. Mark Holcombe, SHRM-SCP, PMP

Mr. Mark Holcombe has more than ten years of management and consulting experience and is recognized as a certified Project Management Professional (PMP) and a SHRM Senior Certified Professional (SHRM-SCP). He has been at Evergreen Solutions more than eight years, during which time he has been promoted through the organization and has led Evergreen's largest local government practice for the past two years. His academic foundation in micro and macroeconomics, combined with his experience leading a business before joining Evergreen, has given him significant experience in leading teams, modeling and controlling costs, and working to provide a product that meets the needs of all stakeholders. This experience has been instrumental in ensuring that his team is able to translate complex and comprehensive data into actionable insights for his clients.

At Evergreen, Mr. Holcombe's emphasis has been in compensation and classification studies of varying size and scope. He has led projects with cities and counties, colleges and universities, K-12 school districts, transportation organizations, and statewide government organizations. Some of his principal areas of expertise are:

- Refining client compensation and classification systems, ensuring alignment with HR best practices and meeting specific client needs.
- Leading initiatives focusing on market competitiveness for large and complex public sector clients.
- Constructing reports and visuals to share complex findings in an approachable way.
- Crafting complex cost models to facilitate accurate budgetary projections for clients.
- Assessing market data, synthesizing information from a variety of sources to provide comprehensive compensation insights.
- Redesigning classification systems to modernize and streamline titling conventions for entire organizations or within job families.
- Conducting staffing analyses to determine efficiency.
- Conducting reviews centered around gender and racial equity in compensation systems, ensuring their adherence to local, state, and federal laws and regulations.

A sample of some of the public sector projects that Mr. Holcombe has been involved with include: a Classification and Compensation Study for Jasper County, MO; a Compensation Study for the City of Dardenne Prairie, MO; a Compensation Study for the City of Fulton, MO; a Compensation Study for the City of Jefferson, MO; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Classification and Benefits Study for the City of St. Peters, MO; a Compensation Study for Sedgwick County, KS; a Comprehensive Compensation Study for Shawnee County, KS; a Classification and Compensation Study for the City of Leawood, KS; a Salary Study for the City of Leawood, KS; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Compensation Study for the City of Shawnee, KS; a Classification and Compensation Study for the North Dakota Court System, ND; a Compensation and Classification Study for Garfield County, CO; a Compensation Study for Grand County, CO; a Classification, Compensation, and Benefits Study for Yavapai County, AZ; A Compensation Study for the City of Flagstaff, AZ; a Classification and Compensation Study for the City of Prescott, AZ; a PTO Survey for the City of

Prescott, AZ; a Compression Analysis and Pay Equity Study for the Town of Prescott Valley, AZ; 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 Albuquerque, NM; a Compensation Study for Aransas County, TX; Salary Survey Consulting Services for Brazoria County, TX; a Wage and Compensation Study for Jefferson County, TX; a Classification and Compensation Study and Analysis for Matagorda County, TX; a Classification and Compensation Study for Randall County, TX; a Classification and Compensation Study and Analysis for Taylor County, TX; a Classification and Compensation Study and Analysis for Waller County, TX; a Classification and Compensation Study for the City of Alpine, TX; a Compensation Study for the City of Big Spring, TX; a Compensation Study for the City of Brownsville, TX; a Compensation Study for the City of Buda, TX; a Classification and Compensation Study for the City of Cleburne, TX; a Compensation and Benefits Survey and Analysis for the City of Deer Park, TX; a Compensation and Classification for the City of Denton, TX; a Compensation Study for the City of Duncanville, TX; a Compensation and Benefits Study for the City of Fair Oaks Ranch, TX; a Compensation/Salary Survey for the City of Freeport, TX; a Compensation Study for the City of Galveston, TX; a Classification and Compensation Study for the City of Kingsville, TX; a Compensation Study and FSLA Review for the City of La Porte, TX; a Compensation and Classification Study for the City of League City, TX; a Comprehensive Market Salary and Benefits Study for the City of Missouri City, TX; a Classification and Compensation Study for the City of Mont Belvieu, TX; a Classification and Compensation Study for the City of Montgomery, TX; a Compensation Study for the City of Wharton, TX; a Comprehensive Classification and Compensation Study for the City of Odessa, TX; a Staffing Study for the City of Pflugerville, TX; a Compensation and Benefits Study for the City of Portland, TX; a Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; an Equity and Compensation Study for the City of Three Rivers, TX; a Classification and Compensation Study for the Town of Prosper, TX; a Compensation and Classification Study for the Woodlands Township, TX; a Classification and Compensation Study for Inyo County, CA; a Compensation Review for Mariposa County, CA; a Classification and Compensation Study Services for the City of Bell Gardens, CA; a Comprehensive Classification and Compensation Study for the City of Camarillo, CA; a Comprehensive Compensation Study for the City of Crescent City, CA; a Classification and Compensation Study/Organizational and Operational Review for the City of Beaumont, CA; a Classification and Compensation Study for the City of Fresno, CA; a Total Compensation Study for the City of Moorpark, CA; a Comprehensive Classification and Compensation Study for the City of Riverbank, CA; a Consultant Services for a Study of the City's Compensation Plan and Benefits for the City of Sanger, CA; a Classification and Compensation Study for the City of Thousand Oaks, CA; a Classification and Compensation Study for the City of West Hollywood, CA; a Classification and Compensation Study Services for the City of Santa Ana, CA; a Classification and Compensation Study for the City of Yucaipa, CA; a Compensation Study for the Long Beach Management Association, CA; a Compensation Study for the City of Bend, OR; a Professional Technical and Expert Services for the City of Portland, OR; a Job Classification Market Study for the City of

Bellingham, WA; a Classification and Compensation Study for the City of Ridgefield, WA; a Comprehensive Classification and Compensation Study for the Kentucky League of Cities; a Job Classification Study and Analysis for Jefferson County, TN; a Classification and Compensation Study for Madison County, TN; Classification and Compensation Consulting Services to the City of Clarksville, TN; a Classification and Compensation Study for the City of Cleveland, TN; a Compensation Study for the Knox County Sheriff's Office, TN; a Review of the Classification and Compensation System for the City of Rochester, MN; a Compensation and Classification Review for the City of Cambridge, MA; a Compensation Consultation Services for Genesee County, NY; an Employee Compensation Study for Livingston County, NY; an Employee a Compensation Study for the County of Montgomery, PA; a Compensation Study for the City of Seaford, DE; a Classification and Compensation Study for the City of Milford, DE; a Compensation Study for Allegany County, MD; a Classification and Compensation Study for Frederick County, MD; a Classification and Compensation Study for Harford County, MD; a Classification Study for Talbot County, MD; a Compensation Study for the City of Baltimore, MD; an Employee Compensation and Classification Study for the City of Takoma Park, MD; a Compensation and Classification Study for Bedford County, VA; a Compensation Consulting Services for Chesterfield County, VA; a Market Salary Survey for Chesterfield County, VA; a Classification and Compensation Study for Loudoun County, VA; a Compensation and Classification Study for Mecklenburg County, VA; a Classification and Compensation Study for the City of Falls Church, VA; a Classification and Compensation Study for the City of Hopewell, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Classification and Compensation Study for the City of Norfolk, VA; a Classification and Compensation Plan for the City of Petersburg, VA; a Comprehensive Compensation Study for Chesterfield County and Chesterfield County Public Schools, VA; a Classification System and Pay Plan Development Study for Franklin County, NC; a Comprehensive Classification and Compensation Study for the City of Fayetteville, NC; a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Market Salary Survey for the City of Rocky Mount, NC; a Pay and Classification Study for Dorchester County, SC; a Compensation Study for Laurens County, SC; an Organizational Assessment of the HR Department for York County, SC; a Classification and Compensation Study for the City of Mauldin, SC; a Wage Study for the Town of Mount Pleasant, SC; a Classification and Compensation Study for Barrow County, GA; a Compensation Study for the City of Commerce, GA; a Compensation Pay Study for the City of Douglasville, GA; a Classification and Compensation Study for the City of East Point, GA; a Comprehensive Position Classification and Compensation-Benefits Study and Analysis for the City of Kennesaw, GA; a Classification and Compensation Study for the City of Milton, GA; a Classification and Compensation Study for the City of Rome, GA; a Classification and Compensation Study for the City of South Fulton, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Classification and Compensation Study for the City of Union City, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for Brevard County, FL; a Classification and

Compensation Study for DeSoto County, FL; a Classification and Compensation Study for Franklin County, FL; Miscellaneous Compensation Work for Franklin County, FL; a Compensation Study for Highlands County, FL; a Classification Study for Manatee County, FL; a Compensation Study for Manatee County, FL; a Compensation Study for Monroe County, FL; a Classification and Compensation Study for Okaloosa County, FL; a Classification and Compensation Study for Palm Beach County, FL; a Classification and Compensation Study for Pinellas County, FL; a Classification and Compensation Study Analysis for Suwannee County, FL; a Compensation Study for the City of Boca Raton, FL; a Compensation Study for the City of Fort Myers, FL; a Compensation Study for the City of Key West, FL; a Compensation and Benefits Study for the City of New Smyrna Beach, FL; a Compensation Study for the City of North Miami, FL; a Classification and Compensation Study for the City of North Miami Beach, FL; a Compensation Study for the City of Miami Springs, FL; a Compensation Study for the City of New Port Richey, FL; a Compensation Study for the City of Zephyrhills, FL; a Compensation Study for the Town of Cutler Bay, FL; and a Compensation and Classification Study for the Town of Davie, FL.

Mr. Holcombe holds a Bachelor's Degree with a dual major in Economics and Criminology from Florida State University. He is a certified Project Management Professional (PMP) and holds a SHRM-SCP certification.

Project Consultant
Mr. Michael Misrahi

Mr. Michael Misrahi is a Project Manager who has been with the firm for more than eight years. During that time, he has served as a Consultant or Project Lead on more than 100 HR consulting projects. He has extensive experience in the development and modification of compensation and classification plans, policies, and practices for organizations varying in size from a few dozen employees to several thousand.

Mr. Misrahi also served as the Compensation Manager at the University of Central Florida, where he oversaw a team of compensation analysts, and was responsible for administering the University's compensation structure for over 10,000 employees.

A sample of some of Mr. Misrahi's public sector projects include: an Employee Classification and Compensation Study for the City of St. Louis, MO; a Comprehensive Compensation Study for Shawnee County, KS; a Compensation and Classification Study for the Brazos River Authority, TX; a Pay for Performance and a Salary Survey for City of Mont Belvieu, TX; a Compensation and Classification Study for the City of Pearland, TX; a Comprehensive Compensation and Benefits Study for the City of Sachse, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; a Classification and Compensation Study for the City of Seguin, TX; a Comprehensive Compensation and Benefits Study for City of Rowlett, TX; a Wage and Compensation Study for Jefferson County, TX; a Compensation and Classification Study and Organizational Review of the RSMU Department for Brazos River Authority, TX; a Compensation and Classification Study Update for Denton County Fresh Water Supply District No. 6 and Denton County Fresh Water Supply District No. 7, TX; a Compensation

Study for Town of Sahuarita, AZ; a Classification and Compensation Study for the City of Prescott, AZ; Classification and Compensation Consulting Services to the City of Albuquerque, NM; a Classification and Compensation Study for Ouray County, CO; a Compensation Study for Grand County, CO; a Compensation and Classification Study for Garfield County, CO; a Compensation Salary Study Review for Davidson Transit Organization, TN; a Compensation Study for the Knox County Sheriff's Office, TN; a Comprehensive Classification and Compensation Study for the Kentucky League of Cities; a Classification, Compensation, and Benefits Survey for Kent County Levy Court, DE; a Compensation Study for the County of Montgomery, PA; a Job Classification and Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for Frederick County, MD; a Classification and Compensation Study for Howard County, MD; a Classification and Compensation Study for Frederick County, MD; a Compensation Study for the County of York, VA; a Classification and Compensation Plan for the City of Petersburg, VA; a Classification and Compensation Study for Loudoun County, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Salary Survey for the State Employees Association of North Carolina (SEANC); a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Simple Comparison and Blended Market Comparison/Competency Market Analysis for the North Carolina League of Municipalities; a Classification, Compensation and Benefits Study for the Town of Kiawah Island, SC; Organizational Assessment of the HR Department for York County, SC; a Compensation Study for Laurens County, SC; a Classification and Compensation Study for the City of Douglasville, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Staffing Study for the City of Fayetteville, GA; a Compensation and Benefits Study for the City of St. Cloud, FL; a Classification and Compensation Study for the City of Sebring, FL; a Compensation Study for Santa Rosa County, FL; a Compensation Study for the City of Key West, FL; a Compensation and Classification Study for the City of Sarasota, FL; a Review of Compensation for the Fire Department for Sarasota County, FL; a Compensation Study for Osceola County, FL; Classification and Compensation Services for the City of Dunedin, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for the City of Doral, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Benefits Study for the City of Key West, FL; a Pay and Classification Study for Bay County, FL; a Compensation and ERP Study for Miami-Dade County, FL; a Pay and Classification Study for Gulf County, FL; a Compensation Study for the Tax Collector's Office of Indian River County, FL; Compensation Consultant Services for the City of Coral Springs, FL; a Salary Study for Highlands County, FL; a Compensation Study for Brevard County, FL; a Classification and Compensation Study for Monroe County and the Monroe County Sheriff's Office, FL; a Compensation Study for Sarasota County, FL; a Salary and Benefits Review for Hernando County, FL; a Classification and Compensation Study for Pinellas County, FL; a Classification and Compensation Study for Palm Beach County, FL; a Pay and Classification Study for Martin County, FL; a Pay, Compensation, and Classification Study for Community Action Stops Abuse, FL; a Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Compensation Study for the City of Fort Myers, FL; a Staffing Study for the Fort Myers Police Department, FL; a Staffing Study for the Leon County Sheriff's Office, FL; a Compensation and Classification

Study for the Town of Davie, FL; an Employee Engagement Survey for the City of Daytona Beach, FL; a Compensation and Classification Plan Update for the Florida League of Cities; a Classification and Compensation Study for the Leon County Sheriff's Office, FL; a Classification and Compensation Study for the Wakulla County Board of County Commissioners, FL; a Classification and Compensation Study for Franklin County, FL; a Classification and Compensation Study for the Broward County Sheriff's Office, FL; and a Classification and Compensation Study for the Hillsborough County Clerk of Court and Comptroller, FL.

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

Project Consultant Ms. Brenda Whurr, PHR, SHRM-CP

Ms. Brenda Whurr, PHR, SHRM-CP, is a Senior 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 Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Classification and Compensation Study for the City of Moline, IL; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of Aransas Pass, TX; a Comprehensive Classification and Compensation Study for the City of Port Arthur, TX; a Classification and Compensation Study for the City of Del Rio, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Total Compensation and Benefits Study for Calaveras County Water District, CA; a Classification and Compensation Study for the West Basin Municipal Water District, CA; a Compensation Study for the City of White House, TN; 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 Review for the City of Cambridge, MA; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification and Total Compensation Study for the Town of Plainville, CT; 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; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Onslow County, NC; a Compensation and Classification Study for the Town of Wendell, NC; an Employee Compensation and Classification Study for the City of Greenwood, SC; 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 Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study and Analysis for the City of Riverdale, 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 and Analysis for the City of Lawrenceville, GA; a Classification and Compensation Study for the City of Hampton, 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 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 the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Naples, FL; a Classification and Compensation Study for DeSoto County, FL; a Classification and Compensation Study for the City of Brooksville, 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; and a Classification and Compensation Study for the City of Kissimmee, FL.

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.

Project Consultant
Ms. Tara Tabachnik

Ms. Tara Tabachnik is a Consultant with Evergreen Solutions. She began her career at Evergreen as a Junior Analyst and has since developed exceptional skills and knowledge in Human Resources consulting that she applies in her current role as a Consultant. Since joining Evergreen, she has mastered the art of conducting market surveys and market research and has been a great resource to the project teams. She has taken on a lead role with Evergreen's market survey efforts through the creation of Evergreen's internal data team. She works closely with all project teams by conducting salary surveys, benefits surveys, staffing surveys, analyzing staffing needs; and market research for various types of clients.

A sample of some of the more recent public sector projects that Ms. Tabachnik has been involved with include: a Review of the Classification and Compensation Study for the City of Rochester, MN; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Compensation Study for the City of Jefferson, MO; a Classification and Compensation Study for Jasper County, MO; a Classification and Benefits Study for the City of St. Peters, MO; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Classification and Compensation Study for the City of Leawood, KS; a Compensation Study for

Sedgwick County, KS; a Classification and Compensation Study for Randall County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Comprehensive Classification and Compensation Study for the City of Odessa, TX; a Classification and Compensation Study for the Town of Prosper, TX; a Compensation and Classification for the City of Denton, TX; a Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; a Compensation and Classification Study for Garfield County, CO; 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 Superior Court of California, County of Monterey, CA; a Classification and Compensation Study for the City of Fresno, CA; a Classification and Compensation Study for the City of Thousand Oaks, CA; a Classification and Compensation Study for Inyo County, CA; a Professional Technical and Expert Services for the City of Portland, OR; and a Classification and Compensation Study for the City of Ridgefield, WA; a Job Classification Market Study for the City of Bellingham, WA; an Employee Compensation Study for Livingston County, NY; a Compensation Consultation Services for Genesee County, NY; a Compensation Study for the City of Seaford, DE; a Classification and Compensation Study for the City of Milford, DE; a Classification and Compensation Study for Prince George's County, MD; an Employee Compensation and Classification Study for the City of Takoma Park, MD; a Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for the City of Norfolk, VA; a Classification and Compensation Study for the City of Falls Church, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Market Salary Survey for the City of Rocky Mount, NC; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Classification and Compensation Study for the Broward County Sheriff's Office, FL; a Classification and Compensation Study for DeSoto County, FL; and a Compensation Study for the City of Fort Myers, FL.

Ms. Tabachnik has an MBA and a Bachelor's Degree in Finance from Florida State University.

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

Section C
Project Approach and Work Plan

C. Project Approach and Work Plan

In this section, we provide our understanding of the project's objectives; our approach and methodology for conducting a Classification and Compensation Study for the City of Independence; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables in the scope of services of the Request for Proposal; and our proposed timeline. **We have included a sample final report from a similar project we conducted in the Appendix.**

C.1 Understanding of the Project's Objectives

Evergreen understands that the primary objectives for conducting the Classification and Compensation Study according to the Request for Proposal are to:

- *attract and retain a highly qualified, diverse, and motivated workforce capable of meeting the current and future needs of the community;*
- *ensure internal equity by grouping positions with comparable levels of responsibility, complexity, required skills, and working conditions into a logical classification structure;*
- *achieve external competitiveness by providing salaries and a total compensation package (wages and benefits) that are competitive and market driven, based on a methodology sound survey of comparable public and private sector employers;*
- *establish a clear, consistent, and defensible rationale for the City's pay structure that is transparent and easy for both employees and management to understand and administer;*
- *clearly define career progression opportunities and provide for recognizable and meaningful compensation growth for employees;*
- *ensure that the entire classification and compensation system is fully compliant with all pertinent federal and state laws and regulations, including the Fair Labor Standards Act (FLSA), the Equal Pay Act, and the Americans with Disabilities Act (ADA); and*
- *receive a fiscally responsible, multi-year implementation plan and a comprehensive maintenance program that equips City staff to administer the new system effectively on an ongoing basis.*

C.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Classification and Compensation Study for the City of Independence 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 (i.e., 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.

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

Kick Off Meeting

Evergreen begins each engagement by meeting with our client's leadership team. 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 classification, compensation, and benefits data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

At this time, 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 conducting any Classification and Compensation Study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. The results of these meetings are then communicated to employees during the project outreach through employee orientation sessions, focus groups, and interviews. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

Employee Orientation and Focus Groups

Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question-and-answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

Department Head Interviews

Evergreen staff conduct one-on-one interviews with department heads (in addition to any other employees the client determines is necessary) to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.

Job Assessment Tool and Management Issue Tool

Another important activity undertaken at this time is the distribution of Evergreen's Job Assessment Tool© (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee's job that captures the nature of the job and how it interacts with work within the organization.

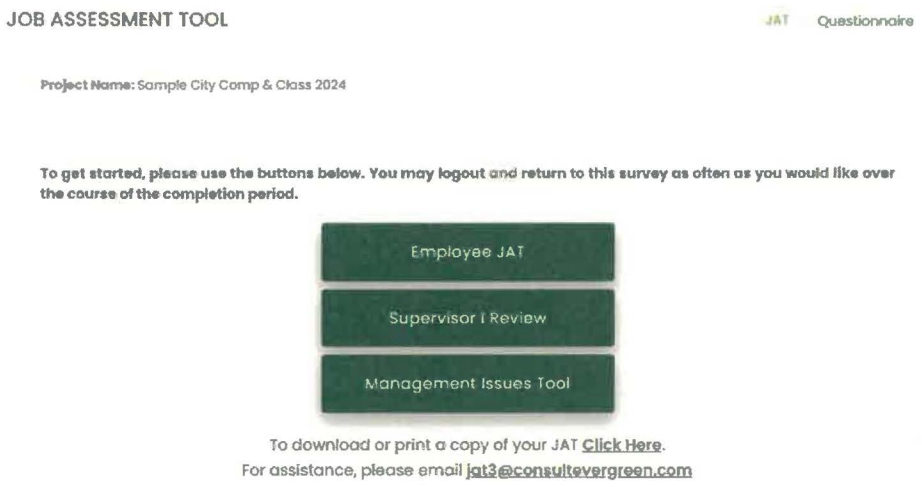
The JAT contains questions that ask about each of the following areas:

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

Evergreen will contact the client's Project Manager should there be a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically. If requested, we can also provide a paper-based version of the tool.

Exhibit C-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.

Exhibit C-1
Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2025

Exhibit C-2 illustrates how Evergreen uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.

Exhibit C-2
Job Description and Responsibilities

Basic Information

Job Introduction

Briefly provide an overview of your job, including a description of the purpose of your job and the type of work you do. This may be the same as the introduction to your current job description, but it does not need to be.

Supervisory Responsibilities

Please indicate below the number of people you supervise directly and/or indirectly. Direct supervision is the management or supervision of employees who report work to you and who you evaluate without assistance. Indirect supervision is the management or oversight of employees who report to you through another supervisor who reports directly to you. Please do not include subcontractors.

Directly

Indirectly

Type of Work

Please select the level that best describes the type of work you perform.

- Clerical/Manual - Perform a variety of office and administrative support duties OR unskilled, labor-intensive tasks.
- Laborer/Trade-Based Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy.
- Technical/Paraprofessional - Performs tasks requiring a solid understanding of basic algebra and statistics OR use of heavy equipment
- Administrator - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance.
- Managerial/Professional - Performs tasks requiring advanced knowledge, which is predominantly intellectual in nature, OR tasks related to the control or administration of part of the organization
- Executive/Advanced Professional - Performs tasks related to managing the organization, or managing a department OR perform work requiring highly advanced knowledge.

Education and Experience

Please select the level that best describes how much education and experience a new-hire should be required to have for your position.

Recommended Minimum Education for a New Hire

Choose One

Recommended Minimum Experience for a New Hire

Choose One

Licenses and Certifications

Please list any licenses, certifications, or professional designations you believe should be required or preferred for your position.

Required

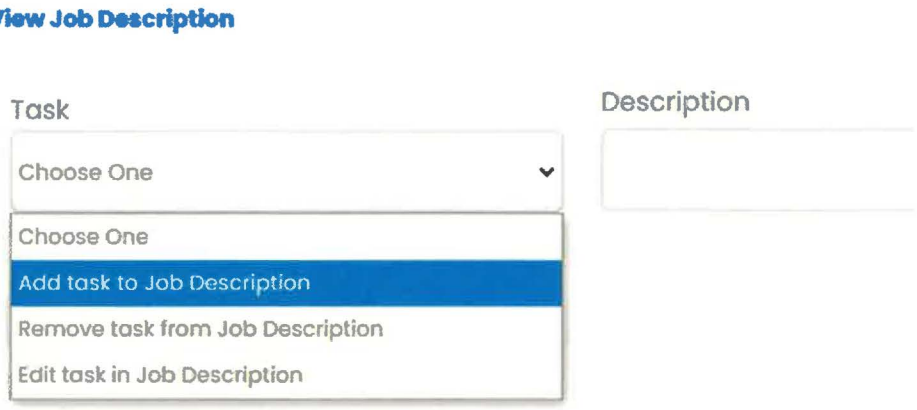
Preferred

Submit

Source: Evergreen Solutions, 2025

Exhibit C-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.

Exhibit C-3
Job Functions



Source: Evergreen Solutions, 2025

In addition to the JAT, Evergreen will also distribute our Management Issues Tool (MIT). The MIT is distributed to supervisors and managers and is used to collect specific information from supervisors and managers related to such issues as recruitment and retention problems, classification issues, pay equity issues, problems with titles, and other related issues. Each MIT will be logged and a specific response will be provided. The MIT process is designed to allow supervisors and managers to give direct input into the process and they serve as "red flags" to Evergreen staff during the analysis portion of the project.

Preliminary Assessment

As a starting point for analysis, Evergreen's project consultants review the client's database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity, compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.

Job Evaluation

The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen's consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any

need for further investigation of specific positions. If serious discrepancies exist, Evergreen's consultants will work directly with the Client Project Manager to resolve any issues.

Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.

Compensation

Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.

The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.

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

Targets

To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

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

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

Evergreen uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

Unifying the Solution

After determining the appropriate division of work and market position, the compensation structure can be created. There is not a single, perfect solution for every client partner. The nuances and unique characteristics of each client necessitate a customized solution to best meet the organization's needs.

The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.
It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen's

consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.

Compensation Administration Guidelines

In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;
- how often to adjust pay scales and survey the market;
- timing of implementation; and
- how to keep the system fair and competitive over time.

System Maintenance

Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

Based on client needs and industry best practices, Evergreen has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: ***JobForce Manager***. This tool allows our clients to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs. By automating these tasks, ***JobForce Manager*** allows our clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit C-4 displays the interface from ***JobForce Manager*** for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

Exhibit C-4
***JobForce Manager* Tool**

Department	Class Title ▲	JAT Score	JAT Projected Grade Min	JAT Projected Grade	JAT Projected Grade Max	Market Midpoint	Market Projected Grade	Pay Plan (Select)	Grade (Select)	Assigned Min	Assigned Mid	Assigned Max
Finance	Accounting Manager	525.0	E06	E07	E08	$93,351.97	E09	Exempt	E10	$75,599.66	$96,389.57	$117,179.48
Finance	Accounts Payable Clerk	300.0	NE05	NE06	NE08			Non-Exempt	NE07	$29,169.65	$34,214.08	$39,258.50
Finance	Accounts Payable Supervisor	443.8	NE15	NE17	NE18	$72,318.33	NE22	Non-Exempt	NE18	$49,889.99	$58,517.68	$67,145.36
Parks & Recreation	Adaptive Recreation Specialist	400.0	NE12	NE13	NE15			Non-Exempt	NE16	$45,251.70	$53,077.26	$60,902.83
Community Development	Addressing Coordinator	337.5	NE08	NE09	NE10			Non-Exempt	NE18	$49,889.99	$58,517.68	$67,145.36
City Manager's Office	Administrative Assistant	268.8	NE03	NE04	NE05	$45,432.78	NE13	Non-Exempt	NE12	$37,228.69	$43,666.79	$50,104.90
Community Development	Administrative Assistant	268.8	NE03	NE04	NE05	$45,432.78	NE13	Non-Exempt	NE12	$37,228.69	$43,666.79	$50,104.90
Engineering	Administrative Assistant	268.8	NE03	NE04	NE05	$45,432.78	NE13	Non-Exempt	NE12	$37,228.69	$43,666.79	$50,104.90
Legal	Administrative Assistant	268.8	NE03	NE04	NE05	$45,432.78	NE13	Non-Exempt	NE12	$37,228.69	$43,666.79	$50,104.90
Police	Administrative Assistant	268.8	NE03	NE04	NE05	$45,432.78	NE13	Non-Exempt	NE12	$37,228.69	$43,666.79	$50,104.90

Source: Evergreen Solutions, 2025

C.3 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Classification and Compensation Study for the City of Independence is provided in this section. Evergreen understands that the City currently has approximately 114 employees in 55 classifications included in this study.

Our work plan consists of the following 11 work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data

- Task 4: Evaluate and Build Projected Classification Plan and Make FLSA Determinations
- Task 5: Identify List of Market Benchmarks and Approved List of Targets
- Task 6: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary
- Task 7: Develop Strategic Positioning Recommendations
- Task 8: Conduct Solution Analysis
- Task 9: Develop and Submit Draft and Final Reports
- Task 10: Develop Recommendations for Compensation Administration
- Task 11: Provide Revised Class Descriptions

Task 1.0
Project Initiation

TASK GOALS

- Finalize the project plan with the City.
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final timeline for all project milestones and deliverables.

TASK ACTIVITIES

1.1 Discuss with the City's Project Manager (i.e., City Manager), and any other key personnel the following objectives:

- the classification and pay plan study process;
- understand mission and current compensation philosophy;
- review our proposed methodology, approach, and project work plan to identify any necessary revisions;
- reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
- establish an agreeable communication schedule.

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

1.3 Obtain relevant materials from the City, including:

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

- organizational charts for the departments and divisions, along with related responsibility descriptions;
- current position and classification descriptions, salary schedule(s), benefits plans, and classification system; and
- union contract(s), the City's personnel policy manual, and recent budget documents.

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

1.5 Provide frequent updates to the City's Project Manager (CPM) throughout the study.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of City staff

Task 2.0 Evaluate the Current System

TASK GOAL

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

TASK ACTIVITIES

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

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

2.3 Identify any pay compression issues and provide potential solutions to the CPM.

2.4 Complete an assessment of current conditions that details the pros and cons of the current system, taking into consideration compensation and benefits, 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 Collect and Review Current Environment Data

TASK GOALS

- Conduct statistical and anecdotal research into the current environment within the City.
- Guide subsequent analytical tasks.

TASK ACTIVITIES

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

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

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

3.4 Work with the CPM and Human Resources staff to administer the JATs (i.e., Position Analysis Questionnaire). and MITs to employees. 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 CPM that may provide additional relevant insight.

KEY PROJECT MILESTONES

- Department head/supervisor interviews
- Employee focus groups and orientation sessions
- JAT/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.
- Characterize internal equity relationships within the City.

TASK ACTIVITIES

4.1 Ensure that all draft class specifications for the City are provided to Evergreen by the CPM.

4.2 Review the work performed by each classification and score based on job evaluation. Include 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 designed at this point would be based solely on internal equity relationships and would be guided by the job evaluation scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.

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

4.7 Define career progression opportunities and provide for recognizable and meaningful compensation growth for employees.

4.8 Review recommendations with the CPM.

KEY PROJECT MILESTONES

- Job evaluation scores by class
- Recommended classification changes
- FLSA determinations
- Preliminary job structure based on internal equity

Task 5.0 Identify List of Market Surveys Benchmarks and Approved List of Targets

TASK GOALS

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

TASK ACTIVITIES

5.1 Identify the classifications that will be used as benchmarks for the market salary survey. **Note:** Evergreen will work with the CPM to identify the City's 55 classifications that will be used as benchmarks for the market 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 and benefits, placing a comparative emphasis on characteristics such as:

- size of the organization;
- geographic proximity to the Independence area;
- economic and budget characteristics; and
- other demographic data.

5.4 Review and finalize with the CPM up to 12 peer organizations that will be included in the market 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 the 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
- Final list of survey organizations and contacts

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

TASK GOALS

- Conduct the external labor market salary survey.
- Conduct a benefits survey.
- 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 for the CPM's approval. 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 benefits provided by the City (i.e., retirement plans, paid time off policies, health, dental, and vision insurance) 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 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.

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

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

6.8 Validate all data submitted.

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

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

KEY PROJECT MILESTONES

- Market survey instrument
- Benefits survey instrument
- Summary report of external labor market salary and benefits assessment results

Task 7.0 Develop Strategic Positioning Recommendations

TASK GOALS

- Determine the City's compensation philosophy.
- Develop a plan for all staff, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

7.1 Identify the accepted 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 salary structure/ranges/grades (minimum, midpoint, maximum) for all City positions.

7.3 Recommend clear and consistent policies for administering the new pay plan, including guidelines for setting starting pay for new hires, handling promotional pay increases, and managing employee movement through their assigned salary range.

7.4 Produce a revised or new pay scale(s) that best meets the needs of the City from an internal and external equity standpoint.

KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account internal and external equity
- Plan for addressing unique, highly competitive positions

Task 8.0 Conduct Solution Analysis

TASK GOALS

- Conduct analysis comparing job evaluation values.
- Survey results for the benchmark positions.
- Produce several possible solutions for implementation.

TASK ACTIVITIES

8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the City.

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

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

8.4 Discuss with the CPM potential solutions.

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

8.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential solutions
- Documented final solution

Task 9.0 Develop and Submit Draft and Final Reports

TASK GOALS

- Develop and submit a draft and Final Report of the Classification and Compensation Study to the City of Independence.
- 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 CPM with a draft report for review and approval that will include all costs associated with recommendations as well as implementation strategies. **Note:** Evergreen will include at least two distinct costing options or scenarios for the City to consider.

9.2 Make any necessary edits and submit necessary copies of the Final Report to the CPM.

9.3 Present the Final Report to the City Council and City's management team.

9.4 Develop a process for communicating results of the study to employees.

9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

Task 10.0 Develop Recommendations for Compensation Administration

TASK GOALS

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

TASK ACTIVITIES

10.1 Develop a written policy and procedure manual of 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 Finalize recommendations.

10.3 Provide training and instructional tools (manual) to the Human Resources Staff, City Manager, Assistant City Manager/City Clerk/Treasurer, Deputy City Clerk, and other designated staff to ensure that staff can conduct individual salary audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's ***JobForce Manager*** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Training on Evergreen's ***JobForce Manager*** tool

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 process.
- 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
- Recommendations for regular review of class descriptions

C.4 Proposed Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct the Classification and Compensation Study for the City of Independence in approximately four months of the project start date and execution of a contract. Our proposed timeline is based on a tentative start date of January 19, 2026, and a completion date of May 19, 2026.

Our proposed timeline, as identified in **Exhibit C-5**, can be modified in any way to best meet the needs of the City of Independence.

Exhibit C-5
Proposed Timeline

PROJECT TASKS	2026				
	JAN	FEB	MAR	APR	MAY
1.0 - Project Initiation					
2.0 - Evaluate the Current System					
3.0 - Collect and Review Current Environment Data					
4.0 - Evaluate and Build Projected Classification Plan and Make FLSA Determinations					
5.0 - Identify List of Market Survey Benchmarks and Approved List of Targets					
6.0 - Conduct Market Salary and Benefits Survey and Provide External Assessment Summary					
7.0 - Develop Strategic Positioning Recommendations					
8.0 - Conduct Solution Analysis					
9.0 - Develop and Submit Draft and Final Reports					
10.0 - Develop Recommendations for Compensation Administration					
11.0 - Provide Revised Class Descriptions					

Section D
References

D. References

We have provided you with the following three references that we feel demonstrate the breadth and quality of the work our team has performed as it relates to the services being requested by the City of Independence on the attached form. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

Reference 1:

Client Name:	City of Moline, Illinois
Contact Person & Title:	Leah Miller, Human Resources Director
Phone:	(309) 524-2069
Email:	lmiller@moline.il.us
Brief Description of Project:	Classification and Compensation Study

Reference 2:

Client Name:	City of Leawood, Kansas
Contact Person & Title:	Nicholas Sanders, Director of Human Resources
Phone:	(913) 663-9105
Email:	nics@leawood.org
Brief Description of Project:	Classification and Compensation Study (included a benefits survey) Evergreen was rehired to conduct a salary survey in 2025.

Reference 3:

Client Name:	City of Dardenne Prairie, Missouri
Contact Person & Title:	Cathy Pratt, City Administrator
Phone:	(636) 755-5311
Email:	cityadministrator@dardenneprairie.org
Brief Description of Project:	Compensation Study Evergreen was previously hired to conduct a Compensation and Benefits Study in 2021.

Appendix: Sample Final Report

City of Independence, IA

Classification and Compensation Study

November 20, 2025

Mr. Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Practice Leader | Public Sector & Higher Education
314.494.4849 | Erik_HenrySmetana@ajg.com

Gallagher Benefit Services, Inc. | ajg.com

Gallagher

Insurance | Risk Management | Consulting

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Part A: Transmittal Letter

November 20, 2025

Matthew R. Schmitz
City Manager
mschmitz@independenceia.gov
331 1st Street E, Independence, IA 50644

Dear Mr. Schmitz:

We appreciate the opportunity to present this proposal regarding the services Gallagher's Human Resources & Compensation Consulting practice can offer the City of Independence (the City). Gallagher is highly capable and qualified to work with the City based on our extensive experience with public sector organizations across the country. We would consider it a privilege to serve the City in this capacity.

It is our understanding that the City is seeking a comprehensive review and modernization of its classification and compensation structures. This study aims to address challenges related to market competitiveness, internal equity, and compliance with evolving legal standards. The scope of work includes analyzing approximately 55 non-union job classifications to develop a modern, defensible, and sustainable human resources framework. The primary objectives include attracting and retaining a qualified workforce, ensuring internal equity, achieving external competitiveness, establishing a transparent pay structure, defining career progression opportunities, ensuring legal compliance, and providing a fiscally responsible implementation and maintenance plan.

We believe we will provide the City with the most diversely experienced project team of any consulting practice in the country, which enhances the solutions and recommendations we will provide on this engagement. The questions and perspective provided by our team ensure we anticipate any issues the City may face throughout this project, as well as the ongoing management of the updated classification and compensation system.

We have prepared the following proposal in response to your request. We appreciate having the opportunity to submit this proposal and look forward to assisting the City in this engagement.

Sincerely,

Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Practice Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Part B: Firm Experience and Qualifications

Value Proposition:

The ability to deliver comprehensively structured human capital solutions to clients is Gallagher's signature in the marketplace. At Gallagher, we want to know what makes your organization unique. We listen intently to learn about your culture and priorities and delve deeply into all the details that matter when balancing human capital needs with your bottom line. This single-minded focus on excellence — characterized by innovation and creativity — is the driving force behind every Gallagher engagement.

Company History:

Arthur J. Gallagher & Co. opened its doors for business in 1927 and is still "growing strong" because of a practiced ability to help clients think ahead. Founded by its namesake who was previously the leading producer for Chicago's largest insurance brokerage, Gallagher is now one of the world's largest human capital, insurance brokerage and risk management services firms. We have operations in 33 countries and extend our client-service capabilities to more than 90 countries through a global network of correspondent brokers and consultants. Since 1961, we have been helping clients overcome business barriers and create new opportunities to cost-effectively attract, retain, and productively engage the best performers in their field. Gallagher started trading on the NYSE under the symbol AJG in 1984.

Company Culture & Philosophy:

The ideals, principles and values embodied by the founder whose name still appears on our door are part of our corporate DNA. Gallagher's approach to business, cultivated through three generations of family leadership, has always centered on creating relationship value as true partners to our clients. Gallagher's interactions with you will be straightforward and candid. By earning the trust of our clients, we have sustained a reputation for ethics and a commitment to transparency that continues to contribute to our growth.

The high standards of conduct we have set for our external professional relationships are the same rules we follow internally. The Gallagher Way, a one-page document that outlines our 25 shared values, was written in 1984 but is just as culturally relevant today. It speaks to the value of relationships and several tenets set guidelines for ethical behavior. Gallagher combines innovative solutions, thoughtful advice and honest business practices to minimize risk and help fuel your success.

Talent Practice:

Gallagher's Talent practice empowers clients to **attract talent, manage staff, develop leaders**, and **reward success**—leveraging the power of Gallagher and wisdom of experience to produce an engaged and productive workforce. Tapping into expertise that spans the spectrum of human resources at every level, we can assemble flexible compensation and consulting solutions that improve efficiency and build bottom lines.

Our practice is a combination of some of the most respected names in human resources and compensation consulting. As we have grown in our services and reach, we have grown in our ability to serve our clients – this includes the acquisition and integration of talented firms, consultants, and advisors from Koff & Associates (2021) and Buck (2023). Bringing together experts from compensation, performance, compliance, data and analytics, survey, and leadership fields, Gallagher empowers clients with tools for the entire lifecycle of employment management.

With an experienced team of consultants located in offices across the United States and Canada, our services include:

HR & Organizational Effectiveness
Think of us as your strategic partner and an extension of your HR and organizational change team.

Compensation & Rewards
We strengthen the employer-employee relationship by designing equitable, competitive, and sustainable compensation and rewards programs.

Multinational Benefits & Mobility
As Global Connectors, we provide solutions for you to manage your multinational workforce in a compliant, coordinated, strategic, administratively efficient, and cost-effective way.

Communications
A global leader in employee communication, we set the industry standard for excellence and innovation

People Development & Insights
We help you understand your customers and your workforce to unlock value and performance.

Public Sector & Higher Education Consulting Practice:

Gallagher's public sector & higher education consulting practice **has completed more than 1,500 classification and compensation related studies for public entities, higher education, and similarly situated clients nationally.** We have extensive experience in developing and communicating compensation philosophy, designing and implementing market-aligned pay structures and career frameworks and developing job evaluation methods to maintain internal equity. We conduct benchmark analyses, including conducting custom tailored salary surveys (if needed), and recommend appropriate administrative and procedural guidelines to maintain the compensation system. We ensure that our clients comply with applicable laws and regulations, such as the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), and Equal Employment Opportunity (EEO) standards and have pay systems that are appropriate for their organization and market strategy.

We have served our clients for more than 40 years across an array of strategic and value-adding HR services with **classification, compensation, and pay equity as our core specialties**.

We have a strategic alliance with the Public Sector Human Resources Association (PSHRA), the National Public Employers Labor Relations Association (NPELRA), and the Colleges and Universities Professional Association for Human Resources (CUPA - HR) and have conducted a series of training seminars/workshops on compensation, classification, job evaluation, strategic HR, and employee benefits management throughout the nation in conjunction with these organizations. Gallagher Benefit Services also focuses on the higher education market. Our consultants have demonstrated leadership in the compensation and strategic HR fields by completing training and certifications from WorldatWork, ERI, HRCI, Human Capital Institute, SHRM, and others in addition to serving as instructors and presenters for ICMA, CUPA-HR, NAPO, WorldatWork, NACO, NPELRA, PSHRA and other regional and national associations. Our thought leadership has been published and/or highlighted in *University Business, PSHRA News, American City and County, TalentCulture, Public Management, TLNT, Corporate Report Ventures, ERE, Corporate Board Member, Benefits Planner*, and others.

As your Trusted Advisor we have additional information for your consideration based on your current focus.

You can expect a trusted advisor in Gallagher, not just a vendor focusing on only one aspect of your HR offerings. While there are numerous vendors that can provide HR consulting, our subject matter expertise is brought to life in the way we partner with our public sector entities and is what truly sets Gallagher apart. Our consulting style is proactive and collaborative. We strive to provide you with relevant information and partner with you to support informed decisions and anticipate the future. As experts in providing a broad spectrum of human resource and talent management capabilities our experience has shown us that many public sector entities conducting a compensation project may also need support in these key areas:

HR & Organizational Effectiveness

Think of our team both as a strategy partner, and as an **extension of your HR team** – providing expertise and additional capacity aligned with your specific HR needs, including strategic advisory, one-off projects, and fractional on-going HR solutions.

Here are some of the ways we can provide support:

- HR Policy Development
- Compliance
  - I-9 Reviews & Revisions, ACA Reporting & Compliance, Local, State & Federal Laws, Fair Labor Standards Act (FLSA) Compliance
- Career Transition Services
- Recruiting Services
- Payroll & HRIS Technology Services
  - Managed Payroll Solutions, Interim Emergency Support, State Tax Registrations, Year-End Support
- HR Technology Selection and Implementation
- Organizational Change Management
- HR Support
  - People Operations (Policies, Handbooks, JDs, Leave, Workplace Investigations)

Communication

You may encounter some cases that require communication such as sharing outcomes and findings of your needs assessment. Our award-winning Communications Practice is a global leader in employee communications.

We **will increase your business performance** by amplifying the entire employee experience through world leading employee communications.

Let us help you with:

- Benefits (Total Wellbeing) Communications
- **Compensation Communication**
- **Reward Communication**
- Retirement Communication
- **Internal Communication (IC)**
- Audit and Insight – Communication Effectiveness
- Organizational Change Communication
- Digital (Communication) Experience
- **Employee Value Proposition (EVP) Development and Communication**
- Personalized Portals
- Non-personalized portals
- Decision-support tools

We welcome the opportunity to further explore how we can partner with you in these critical areas.

Project Staffing:

Our team of specialists and experts brings a proven track record of designing and executing comprehensive compensation strategies, performing complex classification analyses, evaluating pay equity to ensure fair, competitive structures, and delivering high-value strategic HR advisory services. Many of our professionals have served as practitioners within the very sectors we support, granting us unique insight into real-world operational challenges. We combine rigorous data analytics, industry best practices, and innovative thinking to craft customized, forward-looking solutions aligned with each organization's strategic HR goals. By drawing from hands-on experience and leveraging an in-depth understanding of market trends, we help our clients both meet current standards and proactively prepare for an ever-evolving talent landscape.

Gallagher fosters a commitment of excellence, professionalism, integrity, collaboration, and urgency to each of our clients. With each unique client, Gallagher combines these principles to deliver client services customized, specifically to meet your needs. Your Gallagher consulting team has years of experience consulting to public sector clients, including those with unionized and represented employees with a significantly diverse employee workforce with organizations nationwide, including a long history of serving Iowa cities, counties, and public bodies - we have worked with more than 1,000 public sector and higher education clients over the past decade. Each member of Gallagher's public sector compensation consulting practice has achieved one or more of the following certifications and/or degrees:

- Certified Compensation Professional from WorldatWork
- Compensation Analyst Credential from Economic Research Institute
- IPMA-SCP from the Public Sector Human Resources Association
- PHR and/or SPHR from the Human Resources Certification Institute
- SHRM-CP and/or SCP from the Society for Human Resource Management
- SWP and HCS from the Human Capital Institute
- Master's degree or above, in Human Resources, Business Administration, and/or Organizational Psychology

PROJECT LEADERSHIP & LEADERSHIP SUPPORT

ERIK SMETANA, MBA, MFA, SHRM-SCP, SPHR, SWP, HCS, Managing Director & Practice Leader - *25+ years of experience*
Erik manages operations and leads Gallagher's public sector & higher education Human Resources & Compensation Consulting practice. Erik's 25-plus-year work history has led him to serve in various diverse roles across human resource management, particularly in compensation and benefits, talent management and organizational development, people analytics, and employee relations and policy development. Erik has extensive experience in private and public sectors, working with an eclectic mix of dynamic organizations, including Fortune 500 companies across multiple industries, international not-for-profit organizations, membership associations, media outlets (e.g., NPR and NBC affiliates), institutions of higher education and research, and others. Before joining Gallagher, he served as the enterprise-wide Deputy CHRO and business unit CHRO with the University of Missouri System and with Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation, employee learning, talent acquisition, and people-focused programs and initiatives.

As a consultant, Erik has been **engaged in more than 250 client projects with organizations ranging from cities and counties to state agencies to tribal nations and more including school districts, colleges and universities, special districts and authorities,** and other sector aligned entities in the provision of *compensation, classification, pay equity, organizational assessment, leadership coaching, performance management, and other strategic HR advisory services*.

ZAK SHTULBERG, Senior Consultant & Project Operations Lead - *15+ years of experience*
Since starting as an HR consulting intern at Buck (now Gallagher) in 2012, Zak has been mission-driven and passionate about collaboration with clients and partners on transformative people, compensation, and other HR initiatives that improve the lives of employees and their communities. Projects have spanned a broad spectrum, including compensation strategy design, change management and communications, workforce planning, project management, analytics and technology enablement, and organization design, among many others. With both internal and external partners, he is recognized for blending strategic and technical advice with innovative analytics and technology and has grown as a trusted partner and subject matter expert in HR and compensation. Prior to starting his career, he earned a Bachelor of Science in Industrial and Labor Relations from Cornell University.

TRACY MORRIS, MBA, SHRM-CP, Senior Consultant & Systems Optimization Lead - *15+ years of experience*
Tracy has more than a decade of experience working in the strategic HR space with significant public sector HR and compensation consulting. Tracy holds a bachelor's degree in applied economics and a Master of Business Administration, both from Texas Tech University, and she is a SHRM Certified Professional (SHRM-CP). She serves clients as a project manager, thought leader, and advisor – additionally, she supports and manages our process improvement and optimization efforts to ensure each of our clients has an experience that meets their needs and exceeds their expectations.

CHRISTINE NICHOLS, Operations Support Specialist - *30+ years' experience*
Christine joined Gallagher in 2023, bringing more than 30 years' experience in Operations Support to the practice. Prior to joining Gallagher, she worked in the private sector for a Global staffing company. In her role as Operations Support for the practice, Christine ensures that all administrative processes across the team run efficiently and effectively, providing seamless client experience from proposal to project closure. She plays an integral part in the contract review process, follows up on client invoices & vendor payments, pulls data from a variety of internal & external systems and coordinates communications with other Gallagher departments. Christine is responsible for managing all RFPs, web inquiries & client referrals to the practice. She also handles all the scheduling of internal & external meetings for the practice, as well as review & audit of practice expenses.

SHARI FALLON, PHR, SHRM-CP, Senior Consultant & Project Manager - *25+ years of experience*
Prior to joining Gallagher, Shari worked for Cornell University as a Senior Compensation & Workforce Analytics Consultant for 24 years. In her role at Cornell University, Shari was responsible for providing expertise and consultation to campus constituents and resolving conflicts among functional areas to support best practice standards. She developed and designed the institutional foundation for assessing, delivering, and applying workforce planning analytics, advancing HR interests and shared responsibility in the consistency of practice across recruiting, compensation, staffing patterns, performance management, training, and transaction processing. Prior to Cornell, she worked in Human Resources for Retail and Health organizations. Shari has a bachelor's degree in political science/history from the College of St. Rose in Albany, NY, and is certified as a Professional in Human Resources from the Society of Human Resource Management.

LARRY ROBERTSON, Senior Consultant & Project Manager - *25+ years of experience*
Larry's 29-plus-year work history includes a variety of roles including compensation, human resources information systems, and recruiting as well as serving in a primary leadership role as acting vice president for human resources for several months. Larry has experience in both private and public sectors, working in a manufacturing environment before moving to higher education for the 21 years prior to coming to Gallagher. He has previously earned professional certifications with the Human Resources Certification Institute (PHR and SPHR). He has been actively involved in CUPA-HR on chapter, regional, and national boards and is a 2022 CUPA-HR Distinguished Service Award Recipient.

DEREK SMITH, PhD, Senior Consultant & Project Manager - *25+ years of experience*
Before joining Gallagher, Derek served as the National Executive Director of the Higher Education Recruitment Consortium and as a part-time consultant with Sawgrass Consulting, following more than 15+ years in higher education leadership roles at places like UNLV, Kansas State University, the University of Missouri System, and the University of Pittsburgh. Derek has a bachelor's degree in history, a master's degree in science, a master's degree in business administration, and a PhD in public policy and leadership. He has earned professional certifications with the Human Resources Certification Institute (PHR), the Society for Human Resource Management (SHRM-CP), Economic Research Institute (ERI) Compensation Analyst Credential, and the Korn Ferry Leadership Architect.

CATHERINE THORP, Senior Consultant & Project Manager - *25+ years of experience*
Ms. Thorp holds a Bachelor of Business Administration degree in Management from the University of Mary Hardin-Baylor. Before joining Gallagher, Catherine worked as a Senior Compensation Manager at Dun & Bradstreet and in roles ranging from analyst to senior manager at McLane Company, Inc. Catherine has applied her compensation knowledge in market analysis, salary structure design, pay equity, career competencies, strategic planning, system integration, and process optimization. Catherine will complete her CCP in 2023.

JAIME PARKER, Senior Consultant & Project Manager - *15+ years of experience*
Jaime has 15 years of experience in Higher Education with 7.5 of those years in compensation and organizational effectiveness. Prior to joining Gallagher, she worked at Kansas State University in Human Capital Services, and in the Office of Institutional Effectiveness. Before her career in Higher Education, Jaime worked in the Banking Industry as a Banking Center Manager and Customer Service Manager. Jaime is a graduate of Kansas State University with a bachelor's degree in accounting.

PROJECT STAFF SUPPORT

CHARMAIN KOHLER, Consultant II & Client Liaison - *10+ years of experience*
Charmain has over 25 years of human resources experience in a variety of roles and industries. She has a bachelor's degree in business administration with a concentration in Management from Saginaw Valley State University. Prior to joining Gallagher, she was the Senior Compensation Analyst at Numotion and at Saginaw Chippewa Indian Tribe of Michigan. Her professional experience also includes 10 years as a Human Resources Consultant in higher education.

SHILOH VENABLE, Consultant II & Client Liaison - *15+ years of experience*
Shiloh Venable is a consultant in Gallagher's Human Resources & Compensation Consulting practice, specializing in the Public Sector and Higher Education service line. She brings more than 15 years of experience in human resources, learning and development, and program management across corporate, nonprofit, and higher education environments. Prior to joining Gallagher, Shiloh served as a learning & development manager at NXP Semiconductors, where she led global leadership development initiatives. She also held roles in nonprofit program management and student affairs at several universities, where she managed complex projects that supported staff and student growth. Shiloh holds a bachelor's degree in human resource development and a master's degree in education administration, both from Texas A&M University. In 2025, she received her Compensation Analyst Credential (CAC) from the Economic Research Institute (ERI). She is also a certified Professional in Human Resources (PHR).

AMBER SHANG, MA in I/O Psychology, Senior Associate Consultant - *5+ years of experience*
Amber holds a BS with honors in Psychology from the University of Washington and an MA in Industrial & Organizational Psychology from New York University. Before joining Gallagher, Amber has applied her knowledge of people analytics in roles ranging from Talent Acquisition at VNS Health to Compensation Analysis at Willis Towers Watson, and Selection & Assessment at DCI Consulting Group. At WTW and DCI, she helped clients from various sectors to tackle challenges and identify strategic solutions. She holds a Certified Analyst Credential (CAC) from the Economic Research Institute (ERI).

MARY GAUTHE, MBA, SHRM-CP, Senior Associate Consultant - 5+ *years of experience*
Mary has five years of experience from Louisiana State University, where she served as a Compensation Consultant within the University's Central HR unit. She holds a bachelor's degree in management with a concentration in Human Resources from Nicholls State University and a master's degree in leadership and human resource development from Louisiana State University. For the past two years, Mary has served as an Associate Consultant within the PSHE team.

CARISSA MARTO, MA in I/O Psychology, Associate Consultant - *5+ years of experience*
Carissa has a bachelor's degree in psychology from Anderson University (SC) and a master's degree in industrial & organizational psychology from Middle Tennessee State University. Prior to joining Gallagher, she held project-based roles working in performance and promotional assessments related to test design.

Part C: Project Approach and Work Plan

Our practice takes a thoughtful and collaborative approach to all our client engagements, where we work to ensure our efforts are ones which demonstrate how the Public Sector & Higher Education practice **C.A.R.E.S.** - collaborate/consult, advise/assess, recommend/resource, engage/endorse, and strategize/serve - about our clients and their needs. To that end, our project approach starts with our process and client communications.

Our extensive experience has resulted in a comprehensive understanding of the scope of work described by the City. Additionally, we understand the importance of this study as one of many strategies to address current human resources issues and appreciate the delicate nature of public sector spending. Below are some key considerations we have in this type of project, followed by our approach to the areas identified by the City, our detailed work plan, and the estimated project timeline.

Key Considerations:

Leadership Support: Effective compensation reform requires consistent, visible leadership commitment at multiple organizational levels. We establish a leadership accountability structure that includes executive sponsors, department champions, and implementation teams with clearly defined roles. Leaders must actively communicate the program's importance, address concerns directly, and visibly support the process through each phase. We provide leaders with focused messaging tools and data points to effectively advocate for changes. Without this multi-level support structure, even technically sound compensation systems often encounter significant resistance during implementation.

Internal Fairness and Equity: Our approach balances external market competitiveness with internal equity through comprehensive job analysis techniques. We conduct detailed comparisons across job families, reporting relationships, and responsibility levels to ensure logical compensation relationships. This includes specialized analysis of career progression paths and appropriate differentials between supervisory and non-supervisory roles. We implement specific methodologies to address compression issues, particularly between long-service employees and new hires with market-driven starting salaries. Our process identifies and remedies historical inequities while establishing defensible rationales for pay differences based on skills, responsibilities, and performance factors.

Appropriate Timelines: We develop realistic project schedules based on organizational complexity and resources. This includes adequate time for comprehensive job documentation, employee input, leadership review cycles, and implementation planning. A typical comprehensive compensation project requires 6+ months for proper execution, including 2-3 months for thorough job analysis, 1-2 months for market research, and 2-3 months for implementation planning, noting that this work may happen concurrently across the life of the engagement. Accelerated timelines often compromise data quality and stakeholder buy-in, leading to implementation challenges and future rework. We establish appropriate checkpoints and quality controls to ensure thoroughness while maintaining momentum.

Data-Driven with Human Oversight: Our methodology combines rigorous data collection with expert interpretation. We utilize multiple validated market sources appropriate for your sector, geographic region, and organizational characteristics. All job matches undergo multi-level validation checks to ensure accurate comparisons. This empirical foundation is then contextualized through structured consultant review panels that consider institutional history, strategic priorities, and unique operational factors as shared and iterated by our clients. We document both the data-driven recommendations and any exceptions to provide a clear, defensible audit trail. This balanced approach ensures decisions are not rigidly algorithmic while maintaining system integrity.

Clear and Consistent Communication: We develop compensation structures and classification frameworks with inherent clarity, using straightforward job leveling frameworks, transparent progression criteria, and consistent application of compensable factors. Communication materials are tailored to different stakeholder needs—executive summaries for leadership, detailed implementation guides for HR professionals, and practical explanation tools for managers and employees. We create accessible resources explaining compensation philosophy, range structure, placement methodology, and future growth opportunities. Systems are designed with straightforward administration requirements that do not require specialized expertise for day-to-day management.

Compression Planning and Analysis: Our implementation approach includes detailed financial modeling that identifies potential compression scenarios before placement decisions are finalized. We analyze the distribution of current salaries against proposed ranges to identify employee clusters and gaps requiring special attention. Implementation options are developed with multi-year cost projections, including various phasing alternatives to balance budget constraints with equity requirements. Special focus is given to departments with significant longevity differences and areas with recent hiring at market rates. This proactive approach prevents creating new inequities while addressing existing compression issues within available resources.

Our Approach:

Comprehensive Job Documentation Review

Our methodical approach to position documentation begins with a thorough review of the City's existing job descriptions to ensure both internal consistency and regulatory compliance. This analysis includes:

- Documentation Structure Assessment
  Systematic evaluation of job descriptions through our 15-point documentation checklist, assessing critical elements including essential functions, ADA compliance language, FLSA classification support, and competency requirements.
- Functional Accuracy Verification
  Application of our validation process to ensure documentation reflects actual work performed. For positions where current documentation (job descriptions or other supporting materials) lacks sufficient clarity or detail, we may implement our Job Analysis Questionnaire (JAQ) methodology. This targeted approach uses our structured JAQ format to capture essential job elements more accurately than traditional methods. The JAQ process is selectively applied only where existing documentation fails to clearly define:
  - Work complexity and decision-making authority
  - Technical skill requirements and application
  - Supervisory/management responsibilities
  - Problem-solving requirements and organizational impact
  - Minimum qualification requirements
- Regulatory Compliance Review
  Application of our compliance checklist to ensure job documentation satisfies requirements across multiple regulatory frameworks, including ADA, EEOC, FLSA, and other applicable laws. This process identifies specific compliance gaps and develops appropriate language solutions.

Internal Equity Assessment

Our internal equity methodology uses analytical techniques to ensure position valuation reflects organizational priorities:

- Job Evaluation System Review
  Assessment of the City's current job evaluation methodology to determine effectiveness and alignment with organizational values. Based on this assessment, we will either:
  - Refine the existing methodology to improve consistency and validity
  - Implement our factor-based evaluation system, customized to the City's specific requirements
- Position Value Analysis
  Application of the selected job evaluation methodology across all positions, using a standardized approach to ensure consistent application of factors:
  - Multiple-reviewer approach to minimize subjective bias
  - Consistency checking across organizational units
  - Identification and resolution of internal equity issues
  - Development of clear rationales for evaluation decisions

- Equity Validation Process
  Implementation of our three-level validation approach to ensure evaluation outcomes reflect genuine job value rather than historical patterns:
  - Horizontal equity checks across functional areas
  - Vertical equity review within career paths
  - Cross-organizational comparison against similar position families

Market Comparison Analysis
Our market analysis methodology combines multiple data sources to create a comprehensive competitive assessment:

- Benchmark Position Selection
  Identification of benchmark positions (typically 60-65% of job classifications), mapping, and communication of process to ensure:
  - Representation across all major job families and levels
  - Focus on positions with reliable and abundant market data
  - Inclusion of mission-critical and hard-to-fill positions
  - Coverage of positions with known compensation challenges
  - Consistency and understanding of roles relative to Gallagher's benchmark mapping process
- Comprehensive Market Data Collection
  Multi-source data approach combining:
  - Published survey data from industry-specific and general compensation surveys
  - Custom survey data collected from selected competitor organizations
  - Current labor market information on compensation trends
- Total Rewards Analysis
  Complete competitive assessment including:
  - Base compensation positioning relative to defined market
  - Variable pay practices and prevalence
  - Benefits package evaluation and competitiveness leveraging Gallagher's industry-leading National Benchmark Survey data
  - Work arrangement flexibility and other non-monetary elements
  - Employer/employee cost-sharing analysis for benefits programs

Compensation Structure Development
Our compensation structure development process transforms market and internal data into an integrated framework that supports organizational objectives:

- Structure Design
  Development of grade and range structures through data analysis:
  - Analysis of market data to establish market-responsive relationships
  - Integration of internal equity requirements into structure design
  - Modeling of various structure options (typically 2-3 alternatives)
  - Review of position distribution across proposed structures
- Position Placement
  Allocation of positions to appropriate grades based on:
  - Internal equity values established through job evaluation
  - Market position requirements for critical job families
  - Organizational design considerations and reporting relationships
  - Career progression pathway requirements
- Implementation Analysis
  Financial analysis to evaluate implementation approaches:
  - Individual employee placement modeling based on defined criteria
  - Development of up to three implementation scenarios
  - Compression/inversion identification and remediation planning

System Sustainability Plan

Our approach ensures the City can maintain and evolve the compensation system independently:

- Comprehensive Documentation & System Integration
  Development of system documentation and transfer of data in formats compatible with the City's HRIS system, enabling smooth integration with existing technology.
- Administrative Knowledge Transfer
  Implementation of our training approach:
  - Thorough training for HR staff on system maintenance
  - Development of administrative tools and decision support materials
  - Creation of position evaluation guides and procedures
  - Establishment of ongoing monitoring and adjustment processes
- Long-term Maintenance Planning
  Development of a sustainable maintenance approach:
  - Annual review methodology and timeline
  - Market monitoring recommendations and data sources
  - Position evaluation guidelines for new or changed positions
  - Budget planning guidance for annual structure adjustments

Our final deliverable will include a comprehensive report detailing methodologies, findings, and recommendations, along with all necessary implementation tools and documentation. This deliverable will provide the City with both immediate implementation guidance and long-term direction for compensation management.

Work Plan:

The work plan proposed is designed to provide the flexibility necessary to attract, retain, and motivate employees to provide quality services and ensure the system is not an administrative and/or costly burden to the City now or in the future. Gallagher has integrated the Scope of Services into our phased approach and deliverables to address the City’s requests. All phases will require that designated the City - team members and Gallagher have ongoing status meetings to explain the process, review the project's progress, review draft materials, address questions, and discuss next steps.

The phased work plan is as follows:

PHASE 1: STRATEGIC ALIGNMENT, PROJECT INITIATION, & STUDY ADMINISTRATION

Our engagement begins with a comprehensive strategic alignment phase designed to establish clear governance structures and critical success parameters:

- **Executive Strategy Session / Preliminary Meeting** (Week 1)
  - Facilitate session with executive leadership
  - Confirmation of organizational priorities and talent philosophy
  - Alignment of compensation strategy with business objectives
  - Risk assessment and mitigation planning
  - Finalization of project scope parameters

- **Project Governance Implementation** (Week 1-2)
  - Establishment of steering committee and working team
  - Definition of roles, responsibilities, and decision-making authority
  - Implementation of our proprietary communication matrix
  - Configuration of project management platform with milestone tracking
  - Development of risk management and escalation protocols

- **Current State Diagnostic** (Weeks 2-3)
  - Comprehensive documentation collection and review
  - In-depth assessment of existing compensation philosophy
  - Evaluation of current classification architecture
  - Gap analysis against industry best practices
  - Identification of critical improvement opportunities
  - Diagnostic findings presentation to project team

- **Stakeholder Engagement Planning** (Week 3)
  - Development of multi-level communication strategy
  - Creation of employee communication materials
  - Configuration of feedback collection mechanisms
  - Establishment of change management protocols
  - Finalization of communication timeline

- **Employee Orientation Sessions** (Week 4)
  - Delivery of employee information sessions
  - Distribution of project overview materials
  - Q&A facilitation with consistent messaging
  - Expectation setting for participation requirements
  - Initial feedback collection

Virtual Meetings are included. On-site visits are available at an additional cost to the City.

PHASE 2: CLASSIFICATION & CAREER FRAMEWORK REVIEW + DESIGN

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables. Some components of Phase 2 will overlap with Phase 1.

Our methodology leverages leading practice and analytical frameworks refined through implementations across hundreds of client engagements:

- **Position Analysis & Documentation Preparation** (Weeks 3-5)

PHASE 2: CLASSIFICATION & CAREER FRAMEWORK REVIEW + DESIGN

- Configuration of Job Analysis Questionnaires (JAQs)
- Development of manager review protocols
- Creation of job analysis interview guides, as appropriate to ensure clarity of information
- Establishment of documentation standards
- Training of internal reviewers on validation methodology

- **Data Collection Execution** (Weeks 5-8)
  - Collection of job description and position information details from client
    - Review and analysis of role details and duties performed
  - Distribution of JAQs to selected employees (1-week completion window), as necessary to supplement job description review
    - Technical support for JAQ completion process
    - Manager review and validation (1-week review period)
    - Follow-up for incomplete submissions
    - Data quality review and normalization
  - Structured manager validation interviews (selected positions)
  - Documentation of organizational relationships

- **FLSA Classification Review** (Weeks 8-9)
  - Application of our 7-point compliance methodology (see appendix for methodology details)
  - Job-by-job exemption status determination
  - Documentation of exemption rationale
  - Identification of compliance risk areas
  - Development of remediation recommendations

- **Classification Architecture Development** (Weeks 9-12)
  - Multi-dimensional job evaluation using the approach of best alignment for the organization, from among the five leading approaches (ranking, classification/grading, point factor, factor analysis, and/or market-alignment)
  - Job family identification and definition
  - Development of career progression pathways
  - Cross-functional alignment analysis
  - Draft classification structure development
  - Internal consistency review and refinement
  - Preliminary presentation to project team for feedback
  - Classification structure refinement based on feedback
  - Final classification structure development

PHASE 3: COMPENSATION, BENCHMARKING & MARKET ANALYSIS

Our data-driven approach combines deep market knowledge with sophisticated analytical techniques:

- **Market Analysis Strategy Development** (Weeks 7-8)
  Gallagher will map organizational roles to standard market benchmarks, based on work performed and not simply internal titling, to ensure consistency and accuracy of market data. This process includes discussion and integration of details regarding hard-to-fill, high turnover, and unique scenarios within the client organization to ensure informed decisions regarding the benchmarking process.
  - Strategic identification of appropriate labor markets and peer organizations
  - Development of data collection strategy
  - Determination of aging factors and effective dates
  - Selection of published survey sources
  - Identification of custom survey participants

PHASE 3: COMPENSATION, BENCHMARKING & MARKET ANALYSIS

- **Custom Market Intelligence Gathering** (Weeks 9-14)
  - Development of custom survey instrument
  - Participant recruitment and confirmation
  - Survey distribution to identified participants
  - Technical support for participants
  - Data collection monitoring
  - Follow-up for non-respondents
  - Data validation and quality review
  - Compilation of custom survey results
  - Supplemental data-mining to ensure sufficient data resources for analysis

- **Published Survey Data Collection** (Weeks 9-14, concurrent with custom survey)
  - Extraction of relevant data from published sources
  - Normalization of data across sources
  - Application of geographic differentials
  - Implementation of aging factors
  - Compilation of comprehensive market dataset
  - Quality assurance review

- **Advanced Data Analytics** (Weeks 14-16)
  - Integration of custom and published data sources
  - Statistical validation of integrated dataset
  - Outlier identification and handling
  - Application of regression analysis for market line determination
  - Competitive positioning analysis
  - Internal equity assessment
  - Pay compression diagnosis

- **Compensation Structure Engineering** (Weeks 16-18)
  - Development of pay structure alternatives (typically 2-3 options)
  - Range modeling with various spread and overlap scenarios
  - Alignment of structure with classification architecture
  - Testing of structure against current positions
  - Financial impact modeling of alternatives
  - Structure refinement based on testing results
  - Finalization of recommended structure

PHASE 4: IMPLEMENTATION STRATEGY, FINAL REPORTS, & SUSTAINABILITY PLANNING

Our approach ensures successful implementation and long-term program sustainability:

- **Financial Impact Analysis** (Weeks 17-19)
  - Individual employee placement modeling
  - Aggregate financial impact calculation
  - Development of implementation scenarios (typically 3)

- **Implementation Strategy Development** (Weeks 19-21)
  - Creation of phased implementation timeline
  - Development of exception handling protocols
  - Red-circle/green-circle treatment policies
  - Communication planning for rollout

PHASE 4: IMPLEMENTATION STRATEGY, FINAL REPORTS, & SUSTAINABILITY PLANNING

- **Policy and Procedure Development** (Weeks 20-22)
  - Comprehensive compensation policy documentation
  - Administrative procedure development
  - Authority matrix creation
  - Process flow documentation
  - Recommendation for governance structure
  - Ongoing maintenance protocols

- **Toolkit Creation and Knowledge Transfer** (Weeks 21-23)
  - Development of position evaluation tools
  - Creation of manager decision-support resources
  - Design of employee education materials
  - Development of training curriculum
  - Delivery of administrator training (2 sessions)

- **Executive Presentation and Finalization** (Weeks 23-24)
  - Preparation of executive presentation materials
  - Delivery of executive briefing session
  - Facilitation of decision-making on implementation approach
  - Finalization of deliverables based on executive input
  - Delivery of all project materials and tools
  - Project close-out and transition to ongoing support

PHASE 5: POST-PROJECT SUPPORT & OPTIONAL ONGOING SERVICES

- **Implementation Support** (Up to 10 hours of direct support for the 6 months following project closure)
  - Technical assistance during the initial rollout
  - Advisory support for complex situations
  - Resolution of emergent issues
  - Refinement of tools based on initial usage
  - Documentation of lessons learned
  - Development of long-term sustainability recommendations

- **Ongoing Support Services (Optional)**
  - The consultant will offer ongoing support services throughout the year, including job evaluation, market pricing, job description development, trend data analysis, and related activities on an ad-hoc basis. The typical turnaround time for ad-hoc requests is two to four business days, depending on the nature and volume of the requests. These services are often provided after completing larger projects to aid in implementing and maintaining the outcomes and deliverables of the initial engagement.

Project Timeline:

The following is an estimate to complete each phase by month. We will discuss the details of each phase during Phase 1 and identify specific deadlines for the project at that time. We will conduct frequent conference calls with the City to ensure the schedule is monitored throughout the project. In today's world, speed is particularly important. However, given the significance of this project, it is just as important for the City officials, department heads, and employees to have sufficient time to review and approve the recommendations of Gallagher and to ensure proper communications occur. We have prepared a timeline to ensure the City has the work products in an expeditious manner. Our phases run concurrently; in that we do not wait until the full completion of a phase to begin another phase. We are prepared to commence the work within two weeks of receiving your authorization to proceed.

PHASE 1: STRATEGIC ALIGNMENT, PROJECT INITIATION, & STUDY ADMINISTRATION	
Milestone	**Timeframe**
Executive Strategy Session / Preliminary Meeting	Week 1
Project Governance Implementation	Week 1-2
Current State Diagnostic	Weeks 2-3
Stakeholder Engagement Planning	Week 3
Employee Orientation Sessions	Week 4
PHASE 2: CLASSIFICATION & CAREER FRAMEWORK REVIEW + DESIGN	
Milestone	**Timeframe**
Position Analysis & Documentation Preparation	Weeks 3-5
Data Collection Execution	Weeks 5-8
FLSA Classification Review	Weeks 8-9
Classification Architecture Development	Weeks 9-12
PHASE 3: COMPENSATION, BENCHMARKING & MARKET ANALYSIS	
Milestone	**Timeframe**
Market Analysis Strategy Development	Weeks 7-8
Custom Market Intelligence Gathering	Weeks 9-14
Published Survey Data Collection	Weeks 9-14 (concurrent with custom survey)
Advanced Data Analytics	Weeks 14-16
Compensation Structure Engineering	Weeks 16-18
PHASE 4: IMPLEMENTATION STRATEGY, FINAL REPORTS, & SUSTAINABILITY PLANNING	
Milestone	**Timeframe**
Financial Impact Analysis	Weeks 17-19
Implementation Strategy Development	Weeks 19-21
Policy and Procedure Development	Weeks 20-22
Toolkit Creation and Knowledge Transfer	Weeks 21-23
Executive Presentation and Finalization	Weeks 23-24
PHASE 5: POST-PROJECT SUPPORT & OPTIONAL ONGOING SERVICES	
Milestone	**Timeframe**
Implementation Support	*Up to 10 hours of direct support for the 6 months following project closure*

Organization

Compensation Study Report

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Introduction

Lee College contracted with Gallagher Benefit Services, Inc. (GBS) to conduct a comprehensive review of its employee compensation plan. Our Public Sector & Higher Education practice has been in business since 1981, serving clients in the public space with the utmost integrity, customer care, and delivery of strategic services focused on compensation and classification, strategic and operational people centric programs and services, and collaborative partnerships with public sector, non-profit, and higher education organizations.

Compensation Study and Methodology

Purpose of Study

This study was conducted to objectively examine the competitive job market and make recommendations for internally fair and externally competitive pay practices. The project included the following processes:

- evaluate competitive market prices for key benchmark jobs;
- determine whether employees are being paid within an appropriate market range;
- determine whether jobs are placed correctly in the pay structure;
- build or align pay structures with the competitive job market; and
- develop an affordable implementation plan with recommended pay adjustments.

Project Activities

The following tasks were completed during the study.

- **Initial planning and data collection**
  Consultants conferred with the Lee College work team to ensure a clear understanding of the concerns and objectives for the study. Pay data collected on personnel employed at the start of the project was used for modeling proposed pay plans and costs.
- **Assess competitive pay levels for common jobs**
  The competitive job market group was discussed and agreed upon by Lee College. Consultants analyzed market data to determine where Lee College is at risk and identified jobs that may need to be adjusted to stay competitive with the external market.

- **Build or align pay range structures**
  A new pay structure was designed to provide competitive pay ranges and internal pay system controls.
- **Design implementation plan with recommended pay adjustments**
- **Review a draft of findings and recommendations and deliver a final report**
  Consultants met with Lee College leaders to review the initial draft of findings and recommendations.

Data Sources

To evaluate the market competitiveness of non-faculty positions at Lee College, we used multiple data sources to ensure both precision and breadth in our analysis. The core of the analysis relied on compensation data from the Texas Association of School Boards (TASB) annual salary survey and CUPA-HR's DataOnDemand platform. These two sources function similarly to a custom survey, as they allowed us to define a targeted peer group for comparison. Lee College provided access to the TASB dataset, which includes detailed compensation data from Texas community colleges. CUPA-HR DataOnDemand allowed us to select relevant peer institutions among two-year colleges, enabling a tailored analysis that reflects Lee College's labor market.

Peers were selected through a two-step process. First, we included colleges in the Gulf Coast Consortium — community colleges in the greater Houston area that partner with Lee College on projects and initiatives and compete for talent. Second, we identified additional peers based on enrollment size, urban location, academic offerings, and service area characteristics (serving small to mid-size Texas communities).

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Peer Institution Name	Location	Enrollment
Alvin Community College	Alvin	6,012
Amarillo College	Amarillo	9,023
Austin Community College	Austin	39,903
Blinn College District	Brenham	17,739
Brazosport College	Lake Jackson	4,127
Coastal Bend College	Beeville	3,991
College of the Mainland	Texas City	5,498
Collin College	McKinney	39,479
Dallas College	Dallas	11,111
El Paso County Community College District	El Paso	24,790
Houston Community College	Houston	52,295
Lone Star College System	Spring	87,250
McLennan Community College	Waco	8,028
Navarro College	Corsicana	6,533
North Central Texas College	Gainesville	8,404
San Jacinto College	Pasadena	31,328
Southwest Texas College	Uvalde	6,563
Tarrant County College	Fort Worth	47,354
Texas Southmost College	Brownsville	8,838
Texas State Technical College System	Waco	8,012
Wharton County Junior College	Rosenberg	5,573

To further validate and supplement these peer-based findings, we incorporated additional published market data from CompData and the Economic Research Institute (ERI), which provide broader market perspectives across industries and geographies. This comprehensive approach ensured that the compensation analysis was both highly targeted to Lee College's most relevant labor markets and informed by broader market trends.

Survey Methodology

Data Collection

Gallagher consultants matched only those jobs that reflected at least 80 percent of the duties as outlined in the benchmark summaries. Once peer data was collected, if there were any questions about

job matching, Gallagher referenced job descriptions, organizational charts and other information to verify that the match was valid. Gallagher conducted quality assurance on the data collected for additional position matches for all peer organizations. Data leveraged was the most recently available information through published survey sources. Gallagher follows the U.S. Department of Justice and Federal Trade Commission guidelines that state five job matches should exist to conduct statistical analyses or drawing conclusions.

Quality Assurance

Gallagher performed several reviews of the data to identify any outlier data and to ensure validity and reliability of the data. Through a statistical analysis, any salary figures that were considered extreme in relation to all other salary figures were excluded. Various statistics were calculated (25th, 50th, & 75th percentiles) in analyzing the data. Once the analysis and report was completed, it was submitted internally through Gallagher's quality control process for review before it was submitted to Lee College.

Aging

All data were trended forward to June 1, 2025 to be more effective for a current point in time. All data were aged using salary budget and salary structure trending factors from the *WorldatWork* salary trend survey:

- **4.0 percent** base salary increase
- **2.0 percent** salary structure adjustment

Geographic Differentials

Applying geographic differentials is a sound compensation practice to normalize data obtained from various locations. This results in more precise figures for use in analyzing and setting pay. Just as data are trended forward to be more effective for a current point in time, data should be adjusted to reflect cost of labor differences between geographic areas. Gallagher used geographic differential data, obtained from Economic Research Institute, to normalize salary data to the equivalent cost of labor for Baytown, TX.

Cost of Labor vs Cost of Living

The difference between the cost of labor and cost of living can mean many different things to many people. In total rewards, it is important to address how cost of labor and cost of living are applied in our profession and business.

In compensation analysis, the cost of labor is preferred over the cost of living because it directly reflects the market rates for hiring and retaining employees in a specific geographic location. The cost of labor is determined by the supply and demand for labor across various industries and occupations, making it a more accurate measure of what employers need to pay to attract and retain talent. This ensures that compensation packages are competitive and aligned with the external labor market's pay practices.

On the other hand, the cost of living measures the expenses required to maintain a certain standard of living, including housing, transportation, and other consumables. While this is useful for understanding the overall affordability of a location, it does not directly correlate with the wages employers need to offer to remain competitive in the job market.

Benchmarking

When benchmarking jobs to the market, it's important to distinguish between **benchmarking actual pay** and **benchmarking your organization's structure** because they serve different purposes and provide unique insights that inform compensation strategies and decision-making.

Benchmarking Actual Pay

This process involves comparing the organization's current pay levels for specific roles to market data for similar positions. The primary goal is to understand how competitive the organization's salaries are in relation to the external labor market.

- **Purpose:** To ensure individual pay rates are aligned with market standards and support talent attraction and retention efforts.
- **Why Do This?** It helps identify whether employees are paid fairly and competitively, preventing underpayment (which could lead to turnover) or overpayment (which could strain financial resources).

- **Use Case:** Adjusting pay for specific roles, addressing pay equity issues, or making targeted market adjustments.

Benchmarking the Structure

This approach involves analyzing the design and alignment of the organization's pay structure (e.g., pay grades, bands, ranges) relative to the market. It focuses on whether the organization's overall compensation framework supports its pay philosophy, career progression, and internal equity while staying competitive externally.

- **Purpose:** To evaluate how well the pay structure aligns with market practices and organizational goals, beyond individual roles.
- **Why Do This?** It ensures that the pay structure is broad enough to support growth and flexibility but not so rigid or outdated that it hampers competitiveness or fairness.
- **Use Case:** Developing or updating pay ranges, ensuring pay progression opportunities, or aligning the structure with market trends for better workforce planning.

Why Do Both?

Focusing solely on actual pay can result in short-term fixes that address individual inequities but fail to address systemic issues. Conversely, benchmarking the structure without examining actual pay can lead to a disconnect between policy and practice, leaving critical inequities unresolved.

- **Holistic Perspective:** Combining both approaches ensures that the organization's pay practices align with its structure and philosophy while remaining competitive in the market.
- **Strategic Alignment:** It allows the organization to attract and retain talent effectively, promote internal equity, and remain fiscally responsible.

By addressing both actual pay and structural alignment, organizations can create a robust compensation strategy that meets immediate needs and supports long-term goals.

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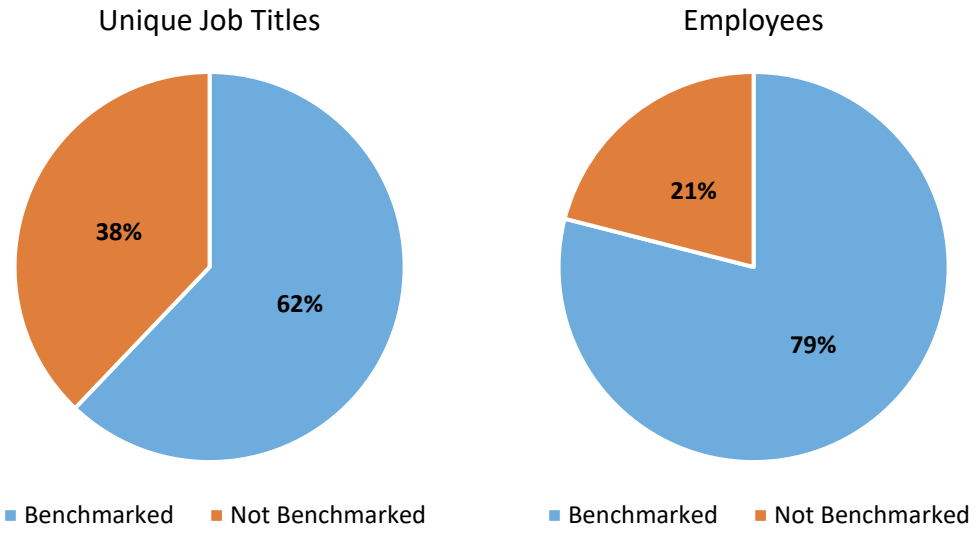
Summary of Findings

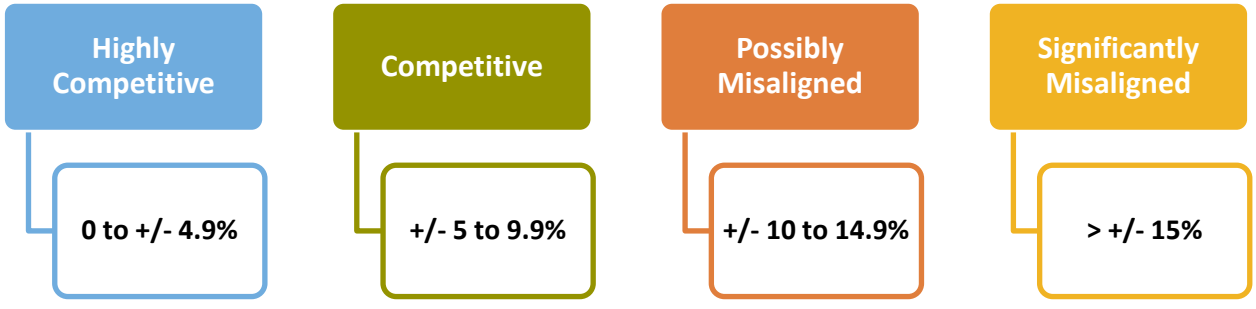
Benchmarking Success

At the time of data collection, Lee College had 198 unique job titles and 376 employees within the scope of study. Sixty-two percent (123) of all unique job titles were successfully benchmarked and 79 percent (297) of all employees are represented across the benchmarked jobs.



Evaluation of Employee Pay to Market

The following guidelines are used to determine the competitive nature of current compensation.



The table below provides a comprehensive summary of the comparison between Lee College's actual salary information and market data for all benchmark positions. As expected, the results reflect a mix of jobs that are below market, aligned with market levels, and above market, illustrating the natural variation in how specific roles compare to external benchmarks.

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Comparison	Comparison to Market 25th %ile	Comparison to Market 50th %ile (Median)	Comparison to Market 75th %ile
Actual Employee Pay	4%	-7%	-16%

Key Finding: Overall, Lee College's compensation for benchmarked positions is, on average, 7 percent below the market median (within the competitive range). This places the College slightly behind the typical pay philosophy of public institutions, which often aim to align salaries with the market median to remain competitive. The majority of positions (94 out of 123) are within 15 percent of the market median, indicating general alignment; however, a small number of positions are significantly above or below market, primarily due to unique roles with very few incumbents.

When looking at all measured quartiles, on average, benchmark positions are paid 4 percent above market 25th percentile and 16 percent below market 75th percentile. When focusing on pay compared to market median, 7 positions are earning more than 15 percent above market median, 94 positions are earning within 15 percent of market median, and 22 positions are earning more than 15 percent below market median. It should be noted that for single incumbent, or very low incumbent positions, individual experience, performance, skills, and unique job responsibilities impact market matches more significantly than for multi-incumbent job titles. Of the 22 positions earning more than 15 percent below market median, 19 have 3 or fewer current incumbents. Of the 7 positions earning more than 15 percent above market median, all 7 have 3 or fewer current incumbents.

Summary of Actual Pay Comparisons to Market Median	Above (Over 115%)	7
	At market (85% - 115%)	94
	Below (Less than 85%)	22

Lee College currently has separate defined pay structures for Administrative, Classified, IT/Trades, and Temporary/Part-time employees. The following table shows the summary of each group's comparison of actual pay to the market percentiles.

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Summary of Market Comparisons by Employee Group

Employee Group	Comparison to Market 25th %ile	Comparison to Market Median (50th %ile)	Comparison to Market 75th %ile
Administrative	9%	-4%	-15%
Classified	-4%	-11%	-19%
IT/Trades	8%	-4%	-13%
Temporary/Part-time	-7%	-13%	-20%

Evaluation of Current Structure to Market

The following table shows a summary comparison between market data and the Lee College salary structures for all benchmark positions.

Comparison	Comparison to Market 25th %ile	Comparison to Market 50th %ile (Median)	Comparison to Market 75th %ile
Salary Structure	-16%	-4%	4%

Key Finding: On average, Lee College's pay structure midpoints are 4 percent below the market median (within the highly competitive range), indicating that the structure is generally close to competitive market levels. Most pay range midpoints (74 out of 115) are within 15 percent of the market median, reflecting broad alignment. However, 27 positions have midpoints more than 15 percent below market, suggesting opportunities for adjustment. As is typical in public sector pay systems, aligning structure midpoints with the market median helps ensure the salary structure supports competitive hiring and retention practices.

When looking at all measured quartiles, on average, benchmark positions have a pay range minimum that is 16 percent below the market 25th percentile and a pay range maximum that is 4 percent above the market 75th percentile. When focusing on pay structure midpoints compared to market median, 14 positions have a pay range midpoint that is more than 15 percent above market median, 74 positions have a pay range midpoint that is within 15 percent of market median, and 27 positions have a pay range midpoint that is more than 15 percent below market median.

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Summary of Pay Structure Comparisons to Market Median	Above (Over 115%)	14
	At market (85% - 115%)	74
	Below (Less than 85%)	27

The following table shows the summary of each group's comparison of pay structures to the market percentiles.

Summary of Market Comparisons by Employee Group

Employee Group	Comparison to Market 25th %ile	Comparison to Market Median (50th %ile)	Comparison to Market 75th %ile
Administrative	-15%	-1%	8%
Classified	-17%	-4%	6%
IT/Trades	-16%	-11%	-8%
Temporary/Part-time*	-14%	-	-

**Temporary/Part-time employee pay is only defined at the minimum for Lee College.*

The market tables detailing the findings for each individual job are provided at the end of this document.

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Recommendations

Recommendation 1

Adopt the proposed pay structures to improve market competitiveness.

- Gallagher has recommended Administrative, Classified, and IT/Trades pay structures that align the pay range midpoints competitively to market median.
- The midpoint-based structures group jobs of similar market value, skill, effort, and responsibility into proposed pay grades with minimum, midpoint, and maximum values.

Recommendation 2

Provide a general pay increase to all eligible employees based on budget availability.

- Salary budget trending factors from the *WorldatWork* salary trend survey indicated a projected 4.0 percent base salary increase. Based on the market trend data, rising inflation, and difficulties in recruiting and retaining talent, we recommend Lee College consider a base pay adjustment of 4.0 percent as budget allows.

Recommendation 3

Implement salary adjustments to improve internal equity and market competitiveness.

- Bring pay for all employees to at least the minimum of their proposed pay range.
- Provide a years' of service calculation to show value for an employee's time in their role. For every year of experience in their current job, each employee received 1 percent up to the pay range maximum.

Recommendation 4

Improve pay equity and budget management by implementing strong pay discipline for employees paid above the maximum of their assigned pay grade.

- Maintain salaries for employees paid at or above the base salary maximum without continuing to increase base pay beyond the maximum of the assigned pay range.
- Employers can consider providing the equivalent of the general pay increase as a one-time payment to employees whose pay rates are above the maximum of their range. This will

communicate value to the employees while honoring the range maximums but likely would not be considered creditable compensation for retirement purposes. Such a payment also would need to be factored into overtime pay calculations for nonexempt employees.

- Freezing pay for employees without advanced warning can lead to employee morale issues and turnover. Consider providing written notification to affected employees in advance of freezing base pay.

Recommendation 5

Adopt a market-based approach to pay planning and annually review the compensation plan and update as needed to maintain market competitiveness.

- Grant pay raises based on available revenue each year, according to market trends.
- Review the pay structures annually and adjust as needed to maintain a competitive position in the local market. Best practice is to adjust the salary structure half of the pay increase granted annually to allow employee pay to move at a faster rate than the pay range movement.

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Cost Estimates

The following table is an estimate of the cost for implementation of the proposed recommendations. These estimates are based on the data provided as a snapshot in time based on the date of data collection. A general pay increase of 4 percent and 3 percent have been modeled and included in these calculations.

Option Explanation	Itemized Costs	Count	Cost ($)	% of Payroll
condensed, market-aligned pay grade structure; $15/hr minimum; 1% per year of service calculation; 4% general pay increase	**Total Current Payroll Costs**	**381**	**$21,585,926**	
	Pay Increase - 4.0%	376	$825,405	3.82%
	Adjustment to Minimum	97	$211,817	0.98%
	Years of Service Adjustment	54	$43,582	0.20%
	Total Increase in Payroll Costs	**372**	**$1,080,804**	**5.01%**
	Total Proposed Payroll Costs		**$22,666,731**	

condensed, market-aligned pay grade structure; $15/hr minimum; 1% per year of service calculation; 3% general pay increase	**Total Current Payroll Costs**	**381**	**$21,585,926**	
	Pay Increase - 3.0%	376	$620,837	2.88%
	Adjustment to Minimum	102	$244,754	1.13%
	Years of Service Adjustment	62	$54,307	0.25%
	Total Increase in Payroll Costs	**372**	**$919,898**	**4.26%**
	Total Proposed Payroll Costs		**$22,505,824**	

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Salary Structure Development

Insert salary structure development page

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Proposed Pay Structure

Pay Grade	Range Minimum (Hourly)	Range Midpoint (Hourly)	Range Maximum (Hourly)	Midpoint Progression	Range Spread
Classified-1	$15.00	**$18.40**	$21.80	-	45.0%
Classified-2	$16.19	$20.24	$24.29	10.0%	50.0%
Classified-3	$17.81	$22.26	$26.71	10.0%	50.0%
Classified-4	$19.59	$24.49	$29.39	10.0%	50.0%
Classified-5	$21.74	$27.18	$32.62	11.0%	50.0%
Classified-6	$24.14	$30.17	$36.20	11.0%	50.0%
IT/Trades-1	$21.21	**$26.35**	$31.49	--	48.0%
IT/Trades-2	$23.34	$28.99	$34.64	10.0%	48.0%
IT/Trades-3	$26.14	$32.47	$38.80	12.0%	48.0%
IT/Trades-4	$29.80	$37.02	$44.24	14.0%	48.0%
IT/Trades-5	$34.57	$42.94	$51.31	16.0%	48.0%
IT/Trades-6	$43.21	$53.68	$64.15	25.0%	48.0%
Administrative-1	$25.60	**$32.00**	$38.40	--	50.0%
Administrative-2	$27.65	$34.56	$41.47	8.0%	50.0%
Administrative-3	$30.42	$38.02	$45.62	10.0%	50.0%
Administrative-4	$34.98	$43.72	$52.46	15.0%	50.0%
Administrative-5	$41.27	$51.59	$61.91	18.0%	50.0%
Administrative-6	$50.85	$66.04	$81.23	28.0%	60.0%
Administrative-7	$65.09	$84.53	$103.97	28.0%	60.0%
Administrative-8	$83.31	$108.20	$133.09	28.0%	60.0%

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Current Structure Comparison to Proposed Structure

Current			
Pay Grade	Range Minimum	Range Midpoint	Range Maximum
Classified-A11	$28,412.80	$35,505.60	$42,619.20
Classified-A12	$29,806.40	$37,273.60	$44,761.60
Classified-B21	$33,758.40	$42,307.20	$50,793.60
Classified-B22	$36,358.40	$45,468.80	$54,579.20
Classified-B23	$39,124.80	$48,880.00	$58,656.00
Classified-B31	$42,744.00	$53,435.20	$64,105.60
IT/Trades-B22	$41,704.00	$52,124.80	$62,545.60
IT/Trades-B23	$44,803.20	$56,014.40	$67,225.60
IT/Trades-B24	$48,963.20	$61,235.20	$73,486.40
IT/Trades-C41	$57,033.60	$74,131.20	$91,208.00
IT/Trades-C43	$65,124.80	$84,656.00	$104,187.20
IT/Trades-C51	$70,616.00	$91,790.40	$112,944.00
Administrative-C41	$49,746.00	$64,672.00	$79,598.00
Administrative-C42	$53,202.00	$69,165.00	$85,129.00
Administrative-C43	$56,827.00	$73,878.00	$90,929.00
Administrative-C51	$61,606.00	$80,091.00	$98,577.00
Administrative-D62	$77,521.00	$100,782.00	$124,042.00
Administrative-E81	$98,661.00	$133,200.00	$167,739.00
Administrative-E91	$116,449.00	$157,215.00	$197,981.00
Administrative-E92	$125,243.00	$169,088.00	$212,932.00

Proposed			
Pay Grade	Range Minimum	Range Midpoint	Range Maximum
Classified-1	$31,200.00	$38,272.00	$45,344.00
Classified-2	$33,675.20	$42,099.20	$50,523.20
Classified-3	$37,044.80	$46,300.80	$55,556.80
Classified-4	$40,747.20	$50,939.20	$61,131.20
Classified-5	$45,219.20	$56,534.40	$67,849.60
Classified-6	$50,211.20	$62,753.60	$75,296.00
IT/Trades-1	$44,116.80	$54,808.00	$65,499.20
IT/Trades-2	$48,547.20	$60,299.20	$72,051.20
IT/Trades-3	$54,371.20	$67,537.60	$80,704.00
IT/Trades-4	$61,984.00	$77,001.60	$92,019.20
IT/Trades-5	$71,905.60	$89,315.20	$106,724.80
IT/Trades-6	$89,876.80	$111,654.40	$133,432.00
Administrative-1	$53,248.00	$66,560.00	$79,872.00
Administrative-2	$57,512.00	$71,884.80	$86,257.60
Administrative-3	$63,273.60	$79,081.60	$94,889.60
Administrative-4	$72,758.40	$90,937.60	$109,116.80
Administrative-5	$85,841.60	$107,307.20	$128,772.80
Administrative-6	$105,768.00	$137,363.20	$168,958.40
Administrative-7	$135,387.20	$175,822.40	$216,257.60
Administrative-8	$173,284.80	$225,056.00	$276,827.20

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Proposed Pay Plan

PDF Proposed Pay Plan and insert here

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Understanding Pay Systems

Objectives of Pay Systems

All organizations have everyday management needs and employee expectations that must be translated into pay practices. An effective pay system should address the organization's needs and its employees' expectations.

Basic Pay System Elements

Job Families	A job family includes jobs that share common characteristics and are grouped into a common pay structure. These characteristics include the type of work performed, the competitive job market, potential career paths for employees, and state and federal laws regulating wages and salaries.
Pay Grades	Compensable job factors such as skill, effort, and responsibility serve as the basis for assigning jobs to different pay levels to achieve internal pay equity among employees. The greater the degree of skill, effort, and responsibility required by a job, the higher the level of pay. Jobs that have similar value and are grouped into the same range of pay are assigned or classified to pay grades.

Job Pricing	While objective job evaluation and classification contributes to internal pay equity, job pricing contributes to external pay equity. Job pricing uses data collected from salary and wage surveys of other employers to determine the external market value of benchmark jobs. This data is used to set pay ranges that are competitive with the external job market. Because jobs have been analyzed and classified into groups of similar value, job pricing does not require a survey match for each unique job.
Job Market	Job markets may be different for different employee groups. By definition, a job market represents the employers that an organization typically competes with to attract and retain employees. Professional employees may be recruited from a larger geographic area than paraprofessional or auxiliary employees. Schools may be the only competitors for instructional positions while other types of businesses may be competitors for business or technology jobs. For this reason, different job markets and survey sources may be used to accurately assess the true competitive job market.
Pay Structure	The pay structure itself is the key management tool that provides control over an organization;s competitive position in the marketplace and internal pay equity among all employees. Designing the pay structure involves setting the proper control points (midpoint, minimum, and maximum rates of pay) for each pay grade and ensuring that appropriate pay differentials between pay grade levels are established.

Issues that must be weighed and balanced in the design of pay structures include:

- positioning the organization competitively,
- impact on current pay practices,
- adequate pay differentials for higher levels of job responsibility,
- internal consistency and rationality, and
- controlled variance within each pay range.

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Compensation Philosophy

A compensation philosophy is simply a formal statement documenting the organization's position about employee compensation. It explains the "why" behind employee pay and creates a framework for consistency. Key Components to include, but are not limited to the following:

Market Competitiveness
Commitment to offer total compensation packages that are competitive with those offered by similar organizations within the market and sector. By targeting the median of market, organizations aim to balance competitiveness with fiscal responsibility.

Internal Equity
Strive to maintain a balanced and fair compensation system that recognizes the value and contributions of each position while promoting a sense of internal equity amongst staff.

Career Progression
Tie compensation to career progression. Develop clear paths for advancement within the organization and ensure that pay increases are associated with increased responsibilities and skills development.

Market Research and Continuous Improvement
Continuously monitor the job market and industry trends to ensure the organization’s compensation packages remain relevant, competitive, and aligned with organizational objectives and commit to regularly reviewing and adjusting compensation philosophy and practices accordingly. This is accomplished by regularly benchmarking salaries and benefits against industry standards.

Legally Compliant
Adhere to all applicable laws and regulations governing compensation and dedicated to managing resources wisely to ensure the long-term financial stability of the organization.

Why is having a compensation philosophy important?

- Helps support business strategy
- Aids in attracting top talent (Market competitiveness/Position)
- Increases employee engagement and motivation
- Ensures fairness and equity
- Increases retention and talent development (Career growth/Progression)
- Helps manage labor cost

- Ensures legal and regulatory compliance
- Promotes transparency and communication

Implementation and Administration

Current employees may be paid outside the recommended pay ranges initially. Decisions must be made during this transition period about how to deal with employees who are paid outside the pay range for their position. If employees are paid below the minimum rate of their pay range, additional adjustments should be provided to increase their pay to at least the minimum rate of pay. If employees are paid above the maximum of the pay range, they are left outside the range. No employee's pay should be reduced in this event.

Employees advance in pay through annual pay adjustments and tied to budget planning. These management decisions are based on current economic conditions, including projected revenues and market competition.

Long-Term Salary Administration

For any pay plan to meet its intended goals on a long-term basis, it must be updated regularly and administered properly. Salary administration involves four primary activities requiring administrative decisions:

- adjusting pay ranges for job market changes and general economic inflation,
- budgeting for annual salary increases for employees,
- placing new employees in the system, and
- calculating special increases for promotions or other job changes.

Pay System Management

The recommendations provided help ensure a market-competitive and equitable system for the organization. However, pay systems are dynamic and are impacted by numerous factors. To maintain a competitive and equitable system, the organization must work to manage its pay system over time. Following are recommendations to aid in this endeavor:

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Adjust Ranges

- Regularly review salary ranges and adjust as needed to respond to market changes. This will help the organization maintain competitive salary levels over time.

Provide Pay Increases

- Provide pay increases based on the available revenue each year. Continuous pay increases are an important factor in employee satisfaction and helps with recruitment and retention efforts.

Pay At Least Minimum

- Ensure all employees are paid at least the minimum rate of pay for their position.

Pay Within Ranges

- Do not advance pay beyond the maximum of the range. Adherence to range limits helps maintain pay equity among employees and control salary costs.

Follow Procedures

- Document and follow consistent administrative procedures that address employee pay actions such as job classifications, promotions, reassignments, and new hire salary placement. Review procedures annually to ensure these are meeting University needs, are consistently applied, and support strategic goals.

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Detailed Market Pages

PDF this document and then replace this page with appendix pages also as PDF documents.

Once all of the documents are together, use Adobe to add a footer to the full document.

- On the left side of the page should be this text ©2025 Arthur J. Gallagher & Co. All rights reserved.
- On the right side of the page should be the page number. Calibri font, size 8
- The footer should begin on page 3 of this report and start with page number 3.

The appendix would normally include at least these documents:

- Benchmark Summary table(s)

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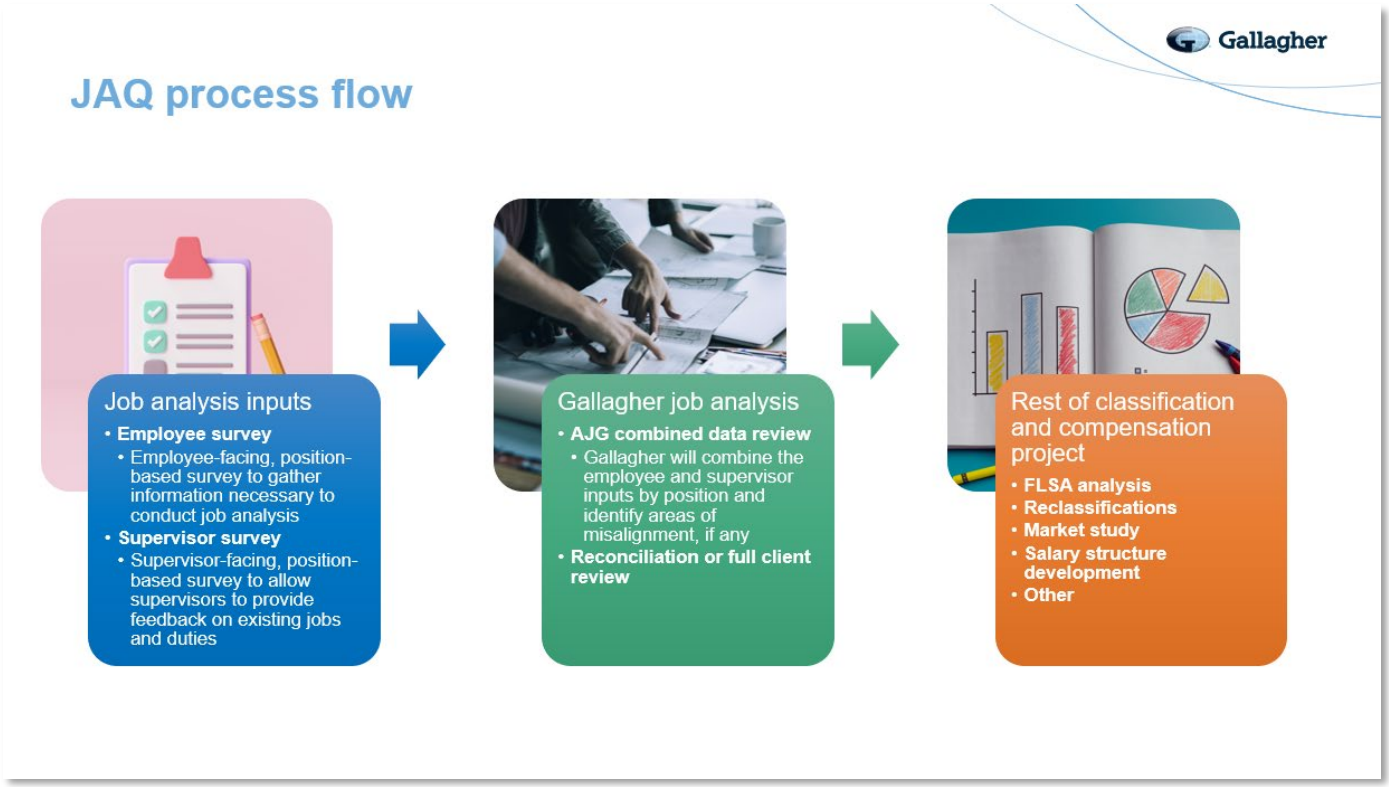
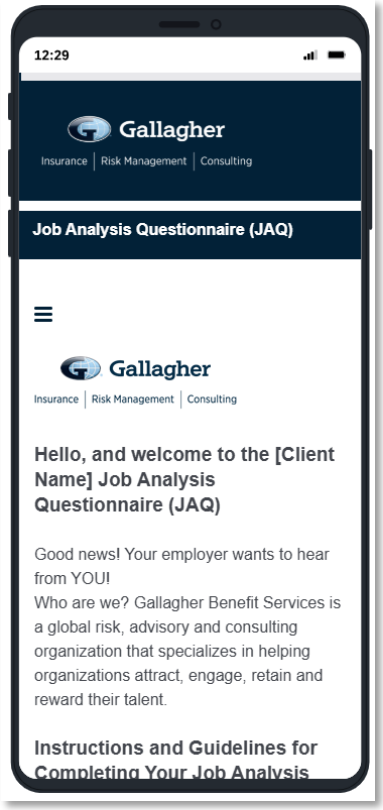
We have also included images of our Job Analysis Questionnaire (JAQ) process, which is administered through a user-friendly online platform and designed to capture both employee and supervisor perspectives efficiently. These tools represent just a sample of the customizable solutions we can provide.





Part D: References

Contact names and phone numbers are listed for each project. These projects are relevant to demonstrating our ability to meet the needs of the City and show considerable experience in developing compensation systems for a variety of public sector organizations. Our references can attest to the timeliness, quality, and responsiveness of the services we provide, our understanding of job classification and pay equity, and our knowledge of legal issues, such as the ADA and FLSA, and our expertise in working with public organizations and sensitive personnel issues. The projects listed below were completed by members of your project team and within similar timeframes to what the City is requesting.

CITY OF RUSTON, LA | *401 North Trenton Street, Ruston, LA 71270*
Julie Keen, Finance Director, 318.251.8651, JulieKeen@RustonLA.gov

In 2022, Gallagher contracted with the City of Ruston to perform a compensation study for all city employees. The study utilized a custom survey and published data to complete the study. The study included police, fire, and utility workers.

CITY OF AUSTIN, TX | *301 West Second Street, Austin, TX 78701*
Bryan Dore, Compensation Manager, 512.974.3216, bryan.dore@austintexas.gov

We have been retained to do numerous projects with the City since 2017. In 2017, we were hired to assist the City with a review and assessment of the compensation strategy and to conduct a compensation study for the Human Resources and Legal departments. In 2019, Gallagher conducted another custom salary survey for the City and a comprehensive evaluation of pay equity in comparison to its prior studies to identify if there are any pay equity issues in the organization. Since 2021, we have been engaged in a number of compensation and broader engagements – with our multi-year agreement renewed for 5 years in fall of 2024 – recent efforts have included compensation philosophy design, organizational assessments, and compensation reviews.

CITY OF GILLETTE, WY | *201 East 5th Street, Gillette, WY 82716-4303*
Déca Wasson, Human Resources Director, 307.686.5222, decaw@gillettewy.gov

From 2022 to 2023, we were contracted by the City to perform compensation and HR advisory services.

HARRIS COUNTY, TX | *3100 Main Street, Houston TX 77002*
Amanda Porter, Senior Manager, Compensation and Position Control, 713.274.3018, Amanda.Porter@harriscountytx.gov

We are currently engaged with the County, the third largest in the country, for a compensation, classification, and pay equity study. This study encompasses over 18,000 employees across 4,000 classifications. The study involves writing job descriptions, creating guidelines, and training for salary administration to ensure pay equity in addition to designing frameworks to support the County's ongoing HR transformation efforts.

PRINCE WILLIAM COUNTY, VA | *1 County Complex Court, Suite 155, Woodbridge, VA 22192*
Stacey E. Allen, Assistant Director of Human Resources, 703.792.5172, SAllen@pwcgov.org

Since 2018, Gallagher and the County have partnered to conduct multiple classification and compensation studies with the goal of ensuring internal equity, external competitiveness, and legal compliance in pay structures while supporting career development and workforce planning. To build the compensation and classification framework from the ground-up, the team reviewed and updated over 310 job descriptions, facilitated employee and supervisor Job Analysis Questionnaires (JAQs), conducted interviews and focus groups, and performed market benchmarking. Deliverables included revised salary structures, implementation cost models, and communication toolkits. The studies concluded with actionable recommendations, including a streamlined classification system, updated pay ranges, and tailored implementation strategies aligned with the County's operational and budgetary needs. Gallagher continues to partner with Prince William County and is currently engaged in a 2025 project to build on the previous work, introducing innovative approaches to JAQ design and data collection and market pricing.

Additional references and/or case studies are available upon request to support client decision-making.

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Contractual Considerations

The Parties expressly agree that this Agreement allows for cooperative procurement. Any public body (health or educational) may utilize this Agreement if authorized by Gallagher in writing. Participation in this cooperative procurement is strictly voluntary. If authorized by Gallagher in writing, this Agreement may be extended to certain entities to purchase certain services provided by Gallagher at fees in accordance with this Agreement (each, a "Participating Entity"). Participating Entities will purchase services directly from Gallagher by and through this Agreement as if it were the named 'Client' hereunder. Gallagher shall look to the Participating Entity and the Participating Entity shall look to Gallagher in the event of invoicing, payments, and/or contractual disputes in accordance with the terms set forth herein. The named Client, nor any other Participating Entity, shall be held jointly and severally liable for any costs or damages in the event of a dispute between Gallagher and that Participating Entity. By entering into this Agreement, no Participating Entity is precluded from other agreements or competitive processes, as the case may arise.

Additionally, each Party or its Affiliates may execute a Statement of Work pursuant to this Agreement with the other Party or any of such other Party's Affiliates, and each such Statement of Work will form a separate contract between the signatory parties thereto. Where the parties to a Statement of Work are an Affiliate of Gallagher or Client, unless context dictates otherwise, references within any provisions of this Agreement to "Gallagher" or "Company" that are incorporated into such Statement of Work shall, for the purposes of that Statement of Work, be construed as a reference to Gallagher's or Client's respective Affiliate that is the signatory to such Statement of Work. "Affiliate" as it relates to a Party means any entity that Controls, is Controlled by, or is under common Control with such Party. "Control" means the ability, whether directly or indirectly, to direct the affairs of another by means of ownership, contract or otherwise.

Gallagher is pleased to submit this proposal to the City. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

Our legal team has provided the following exceptions to the terms and conditions outlined in this proposal. We are open to discussion on these.

- Gallagher is not a federal contractor or subcontractor. Therefore, Gallagher cannot agree to federal contracting provisions contained within the RFP.
- Section 6 (Point 1) (PDF Page 11) - Below are Gallagher's insurance representations based on AJG Risk Management policies. These are not changed on a client by client basis:
  - Gallagher shall at all times during the term of this Agreement and for a period of two (2) years thereafter, obtain and maintain in force the following minimum insurance coverages and limits at its own expense:
  - Commercial General Liability (CGL) insurance on an ISO form number CG 00 01 (or equivalent) covering claims for bodily injury, death, personal injury, or property damage occurring or arising out of the performance of this Agreement, including coverage for premises, products, and completed operations, on an occurrence basis, with limits no less than $2,000,000 per occurrence and $4,000,000 in the aggregate;
  - Workers Compensation insurance with statutory limits, as required by the state in which the work takes place, and Employer's Liability insurance with limits no less than $1,000,000 per accident for bodily injury or disease. Insurer will be licensed to do business in the state in which the work takes place;
  - Automobile Liability insurance on an ISO form number CA 00 01 covering all hired and non-owned automobiles with limit of $1,000,000 per accident for bodily injury and property damage;
  - Umbrella Liability insurance providing excess coverage over all limits and coverages with a limits no less than $10,000,000 per occurrence or in the aggregate;
  - Errors & Omissions Liability insurance, including extended reporting conditions of two (2) years with limits of no less than $5,000,000 per claim, or $10,000,000 in the aggregate;

- Cyber Liability, Technology Errors & Omissions, and Network Security & Privacy Liability insurance, including extended reporting conditions of two (2) years with limits no less than $2,000,000 per claim and in the aggregate, inclusive of defense cost; and

- Crime insurance covering third-party crime and employee dishonesty with limits of no less than $1,000,000 per claim and in the aggregate.

All commercial insurance policies shall be written with insurers that have a minimum AM Best rating of no less than A-VI, and licensed to do business in the state of operation. Any cancelled or non-renewed policy will be replaced with no coverage gap, and a Certificate of Insurance evidencing the coverages set forth in this section shall be provided to Client upon request.

- Section 6 (Point 2) (PDF Page 11) - Indemnification should be limited to grossly negligent acts and omissions, breaches of the contract, intentional misconduct, or violations of law.

- Section 6 (Point 2) (PDF Page 11) - A limitation of liability of fees paid needs to be added to the indemnification provision. We would request this limit be set at total project fees.

- Section 6 (Point 4) (PDF Page 11) - This section should make clear that Client shall own all final deliverables provided to Client by Gallagher as part of the services provided under this Agreement, provided however, Gallagher shall retain sole and exclusive ownership of all right, title, and interest in, and to, its intellectual property and derivatives thereof which no data or Confidential Information of the Client was used to create and which was developed entirely using Gallagher's own resources, including any and all pre-existing or independently developed know-how, methods, processes and other materials prepared by Gallagher. To the extent Gallagher's intellectual property is necessary for the Client to use the deliverables provided under this Agreement, Gallagher grants to Client a non-exclusive, royalty-free license to Gallagher's intellectual property solely for Client's use of such deliverables.

* * * * *

Thank you for this opportunity to offer our services. Please feel free to contact us at any time if you have any questions or require additional information. We look forward to hearing from you soon.

Sincerely,

Erik Smetana, MBA, SPHR, SHRM-SCP, SWP
Managing Director & Practice Leader
314.494.4849 | Erik_HenrySmetana@ajg.com

Appendix 1: Publications & Conference Presentations

Over the past 36 months, your Gallagher Public Sector & Higher Education consultants have actively contributed to the discourse through a variety of publications and conference presentations. These efforts underscore our commitment to thought leadership and our dedication to advancing industry practices. This section highlights our key publications and presentations, showcasing our expertise and the value we bring to our clients and partners.

K-12 Emerging Trends & Risks for this School Year (Webinar)
Arthur J. Gallagher & Co. | July 23, 2025

Navigating What's Next: Revenue, Risk, and the Future of College Athletics (Webinar)
Arthur J. Gallagher & Co. | May 8, 2025

FMLA Bootcamp: Leave Management Trends, Paid Time Off & Sick Banks (Webinar)
myBenefits Channel | April 24, 2025

How Student-Athlete Pay Can Boost Students, Sports, and Institutional Success
Arthur J. Gallagher & Co. - News & Insights | February 26, 2025

Shaping the Journey to Fair Pay for Student Athletes
Arthur J. Gallagher & Co. - News & Insights · Jan 15, 2025

Competitive Compensation Structures for Higher Ed Institutions and Systems
CUPA-HR presentation | September 2024

Public Sector: Trends in Compensation & HR
Public Sector HR Association (PSHRA) - Virginia Chapter - State Conference | September 24, 2024

How a Compensation Philosophy Can Boost Employee Engagement in the Public Sector
Arthur J. Gallagher & Co. - News & Insights Jul 2, 2024

Driving Public Sector Excellence: The Power of Job Architecture and Career Frameworks
Arthur J. Gallagher & Co. - News & Insights | May 2, 2024

Promoting Excellence and Pay Equity: The Benefits of Merit Pay in Higher Education
Arthur J. Gallagher & Co. - News & Insights·| April 8, 2024

Recruitment and Retention Opportunities within the Public Sector & Public Safety
National Association of Police Organizations - Retirement & Benefits Symposium | January 29, 2024

How a Coaching Leadership Style Unleashes Human Potential at Work
TalentCulture | Jan 16, 2024

Does Your HR Strategy Leverage Organizational Competencies
TalentCulture | June 23, 2023

Workforce and Succession Planning Can Help Stem Higher Education Employee Turnover
Arthur J. Gallagher & Co. - News & Insights · May 15, 2023

Looking Beyond the "Great Resignation" and Planning for a Great Future
International Public Management Association for Human Resources (IPMA-HR) | September 27, 2022

Leverage Compensation Strategies to Attract and Retain Top Public Talent (Conference Presentation)
IPMA-HR Central Region Conference, ICMA

Leverage a Holistic People Strategy to Help Higher Education Employers Face the Future with Confidence
Arthur J. Gallagher & Co. - News & Insights | July 15, 2022

Prepare Now for FLSA Rule Changes Coming Soon
Arthur J. Gallagher & Co. - News & Insights | March 15, 2022

Appendix 2: FLSA Compliance Methodology

Our 7-Point FLSA Compliance Methodology provides a structured, defensible approach to determining the appropriate exemption status of each position within your organization. This systematic framework goes beyond basic salary thresholds to ensure proper classification according to the most current Department of Labor regulations and case law interpretations.

1. Salary Basis Assessment

- Evaluation of compensation structure against current FLSA minimum salary requirements
- Analysis of pay practices for compliance with salary basis test requirements
- Review of compensation delivery methods and frequency
- Assessment of permissible and impermissible deductions
- Identification of salary basis vulnerabilities and remediation recommendations

2. Primary Duty Analysis

- Quantitative time allocation analysis across job functions
- Relative importance assessment of exempt vs. non-exempt functions
- Freedom from direct supervision evaluation
- Comparative wage differential analysis between positions
- Documentation of primary duty determination rationale

3. Discretion & Independent Judgment Evaluation

- Assessment against standardized regulatory factors for independent judgment
- Analysis of authority to formulate, affect, interpret, or implement policies/practices
- Documentation of decision-making authority and constraints
- Evaluation of consequences of decisions and recommendations
- Comparison against DOL examples and precedents for similar positions as appropriate

4. Exemption-Specific Testing

- Targeted assessment against relevant exemption criteria:
  - Executive exemption: supervision, hiring/firing authority analysis
  - Administrative exemption: administrative vs. production work distinction
  - Professional exemption: specialized education/expertise requirements
  - Computer professional: systems analysis and programming function review
  - Outside sales: customer location and sales activity documentation
- Application of relevant regulatory interpretations and case law precedents

5. Industry-Specific Considerations

- Application of industry-specific exemptions and requirements
- Analysis of specialized rules for educational institutions, government entities, healthcare, etc.
- Review of collective bargaining implications, if applicable
- Assessment of state-specific requirements that exceed federal standards
- Documentation of industry-specific compliance rationale

6. Documentation Alignment

- Job description language assessment for exemption supportability
- Identification of documentation vulnerabilities
- Development of compliant descriptive language
- Creation of audit trail documenting exemption determination process
- Alignment of job documentation with actual duties performed

7. Risk Assessment & Mitigation Planning

- Comprehensive evaluation of misclassification risk by position
- Financial impact analysis of potential misclassification
- Prioritization of positions requiring classification changes
- Development of implementation timeline for required changes
- Creation of monitoring protocols for ongoing compliance

This methodology ensures that all exemption determinations are made systematically, consistently, and in accordance with current regulatory requirements. Our approach has been validated through successful implementation with hundreds of clients and has withstood scrutiny in DOL audits and legal challenges

Appendix 3: Job Description Review & Analysis Process

Systematic evaluation of job descriptions through our 15-point documentation checklist, assessing critical elements including essential functions, ADA compliance language, FLSA classification support, and competency requirements.

1. **Strategic Role Alignment**
   Validate that the role supports the institution's mission, strategic priorities, and organizational structure.

2. **Position Title Benchmarking**
   Assess title consistency with internal hierarchies and external market comparators.

3. **Organizational Context**
   Clearly define reporting lines, supervisory scope, and cross-functional interfaces.

4. **Essential Duties and Responsibilities**
   Articulate core functions using outcome-based language that reflects operational impact.

5. **ADA-Compliant Language**
   Ensure inclusion of physical and cognitive requirements with appropriate accommodation language.

6. **FLSA Classification Justification**
   Provide documented rationale for exempt/non-exempt status based on duties and salary thresholds.

7. **Minimum Qualifications**
   Specify baseline education, experience, and certifications required for role entry.

8. **Preferred Qualifications**
   Identify additional attributes that enhance performance or succession potential.

9. **Competency Mapping**
   Align behavioral and technical competencies with institutional competency models.

10. **Work Environment and Conditions**
    Describe physical demands, work setting, and any unique environmental factors.

11. **Work Schedule Expectations**
    Clarify standard hours, flexibility, travel, and remote/hybrid eligibility.

12. **Performance Metrics and KPIs**
    Define success measures and how performance will be evaluated.

13. **Technology and Tools Utilized**
    List key systems, platforms, and tools essential to the role.

14. **Review Cadence and Governance**
    Establish a schedule for periodic review and stakeholder accountability.

15. **Documentation and Version Control**
    Maintain audit-ready records with version history and approval tracking.

Appendix 4: Additional Services

We are confident we have provided our most cost-effective and best approach. We have included all products and services which are necessary to provide innovation as well as the functional capabilities proposed in our response. We take pride in our creativity and track record in developing innovative solutions to compensation and benefit issues. We spend considerable time and effort researching and exploring trends and technical issues to develop and test approaches not usually considered by other consulting firms that help inform innovative compensation program solutions.

While we will train the City in its use of the recommended compensation system to ensure the City is able to answer questions and maintain the system long-term. The following services are optional and may be provided in the future:

General Consulting and Strategic Advisory Services

Billed hourly, rate varies based on level of consulting required; dependent on scope of engagement may be billed on a fixed fee basis

Includes the provision of consulting and advisory services focused on areas of human resources, compensation and classification, and related areas. Typically conducted to help develop strategic and operational approaches, support leadership decision making, or to review and/or assess current approaches and processes (e.g., performance assessment, etc.) compensation decisions (e.g. review pay decision – not facilitate a review/study – for HR leader) as a neutral third-party.

Leadership Coaching

Billed hourly, rate varies based on level of consulting required; billed on a fixed fee basis for ongoing client engagements

Facilitated dialogues with leaders regarding leadership and management approach, strategic thinking and style, communications approach, and other related topics to further enhance the individual's leadership presence, ability, and perspectives.

Strategic Planning Facilitation

Billed hourly plus related expenses, rate varies based on level of consulting required

Facilitated leadership discussion to outline, identify, and develop strategic roadmaps affecting the direction and approach of an organization over a defined period (i.e. 3 to 5 years) to include operational and strategic imperatives, articulation and definition of employment value proposition, and understanding linkages to organizational outcomes/priorities.

Succession Planning

Billed on a fixed fee basis based on particulars of the study

A review of current leadership and organizational staff as well as identification of talent gaps/needs. Typically, it includes working sessions (N dependent on size of organization) to assess existing staffing mix, organizational fit and other success factors, as well as proficiency in current role and progress toward next level of role and advancement readiness. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Process Design & Re-Engineering

Billed on a fixed fee basis based on particulars of the study

Includes a review of selected processes and practices, assessment of components (value add vs. value waste vs. value neutral but necessary), mapping of revised processes and as appropriate development of updated standard operating procedures documentation (SOPs).

Organizational Effectiveness Assessment

Billed on a fixed fee basis based on particulars of the study

Includes a review and in-depth assessment of organizational practices, structures, and operational alignment, often across multiple working units, to determine opportunities for organizational design, operational and strategic priorities, modification of mission/vision and/or how the organization delivers on those items, and to identify opportunities that may increase effectiveness and efficiency. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Span of Control Assessment

Billed on a fixed fee basis based on particulars of the study

Includes a review and in-depth assessment of organizational spans and layers, often across multiple working units, to determine opportunities for organizational redesign, modification of degrees of separation to senior leadership, and to identify opportunities that may increase effectiveness and efficiency. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Reclassification Review

Billed per title

Includes a review of job information through analysis of existing or new job description or Position Description Questionnaire, follow-up with HR, supervisor, or employee as appropriate to ensure understanding, and then development of memo recommendation. Deliverables include a memorandum summarizing our findings, conclusions, and recommendations.

Job Description Development

Billed per title

Leveraging an updated Position Description Questionnaire, Gallagher confirms the need of creation of new classification, and confirmation with client, and writing of new classification.

Market pricing

Billed per title

Client provides job information in current or new job description, Position Description Questionnaire, and Gallagher collects market data from published survey ($400) and develops market pricing worksheets and memo on the process. If the client needs market data from the local market (like custom survey), Gallagher will research or conduct individual survey, and collect market data from published survey sources to develop the market pricing worksheet and a detailed memo on the process.

Annual Adjustments and Trend Data

Billed per scope of request

Collection of market salary trend data from published survey sources or local market trend data with development of a memo on process and recommendations associated to any structural adjustments.

Executive Compensation Study (Public Sector, Higher Education, Non-Healthcare NPOs)

Billed on a fixed fee basis based on particulars of the study

Comprehensive review of executive compensation and perquisites to facilitate compensation committee decision-making and confirm reasonability of pay packages. This may include but is not limited to research and analysis of market data, industry data (IPEDs, 990, etc.), and others to review or recommend a going-forward approach for affected executives. This type of study is recommended as an annual study.

Pay Equity Study

Billed on a fixed fee basis based on particulars of the study

Comprehensive review, but not limited to actions including, performing a series of statistical tests to determine if there are any pay differences between gender and protected groups that are statistically significant. We will determine whether these differences can be explained by a factor other than gender, race, or age. Statistical analyses will be performed in accordance with standard, professionally accepted methods and those methods that are recognized by the Equal Employment Opportunity Commission (EEOC). Deliverables typically include general pay breakdowns to assess the pay levels and representation for each breakout identified, perform statistical analysis to identify systemic issues, and provide detailed comparisons where necessary. This type of study is recommended as a triennial study.

Performance Management/Assessment Study

Billed on a fixed fee basis based on particulars of the study

Includes the review of existing programs and approaches, stakeholder feedback collection, development of tools and resources and recommendations, and as appropriate custom peer surveying to identify and leverage best practices across region, industry (e.g. higher education), peer cohorts, role type that are supportive of the strategic and operational imperatives of the client to support employee engagement, performance management, and culture. This type of study is recommended as necessary, based on the particulars and needs of the client.

Compensation and Classification Audit

Billed on a fixed fee basis based on particulars of the study

An external review of current market data collection, data sources, job matches, and salary structures. Audit delivery will validate existing processes or result in recommended alternative approaches leveraging the available data. This type of study is recommended as necessary, based on particulars and needs of the client, often coinciding with internal structure changes or revisions.

Change Management

Billed on a fixed fee basis based on particulars of the study

An assessment of current change management practices and communications approaches related to organizational change to identify opportunities for enhancement, additionally as appropriate to the organizational need, training related to managing and facilitating organizational change and the development of communications tools and resources to support change may be developed and delivered to better ensure success and revised internal practices.

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	Gallagher Benefit Services
Mailing Address:	2850 Golf Rd, Rolling Meadows, IL 60008
Website:	https://www.ajg.com/
Year Firm Established:	Gallagher Benefit Services was established 1999. AJG was founded in 1927.
Office Location Performing the Work:	8 Cadillac Drive, Suite 200, Brentwood, TN 37027
Primary Contact Person:	Erik Smetana
Title:	Managing Director & Practice Leader
Phone:	314.494.4849
Email:	Erik_HenrySmetana@ajg.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [✓] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [✓] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

the exterior with: **"SEALED COST PROPOSAL – SALARY STUDY"**.

Technical Proposal Contents:

- [ ] **Part A: Transmittal Letter:** A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [ ] **Part B: Firm Experience and Qualifications:**
  - [ ] Firm history, size, and ownership structure.
  - [ ] Detailed experience with public sector classification and compensation studies.
  - [ ] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [ ] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [ ] **Part C: Project Approach and Work Plan:**
  - [ ] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [ ] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [ ] A sample of a final report from a previous, similar municipal project.
  - [ ] A sample of a job description from a previous, similar municipal project.
- [ ] **Part D: References:**
  - [ ] At least three (3) references from public sector clients (use Section 3 of this form).
- [ ] **Part F: Acknowledgement Form (Section 4 of this form):** Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [ ] All-inclusive, "not-to-exceed" total project cost.
- [ ] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [ ] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Provide at least three (3) references from public sector clients for whom similar work was completed within the last five years.

Reference 1:

Client Name:	See References section of proposal for details.
Contact Person & Title:	
Phone:	
Email:	
Brief Description of Project:	

Reference 2:

Client Name:	See References section of proposal for details.
Contact Person & Title:	
Phone:	
Email:	
Brief Description of Project:	

Reference 3:

Client Name:	See References section of proposal for details.
Contact Person & Title:	
Phone:	
Email:	
Brief Description of Project:	

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY. List Addenda Numbers received:
   Addenda 1, 2
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	Erik Henry-Smetana
Printed Name:	Erik Henry-Smetana
Title:	Managing Director & Practice Leader
Date:	11/18/2025

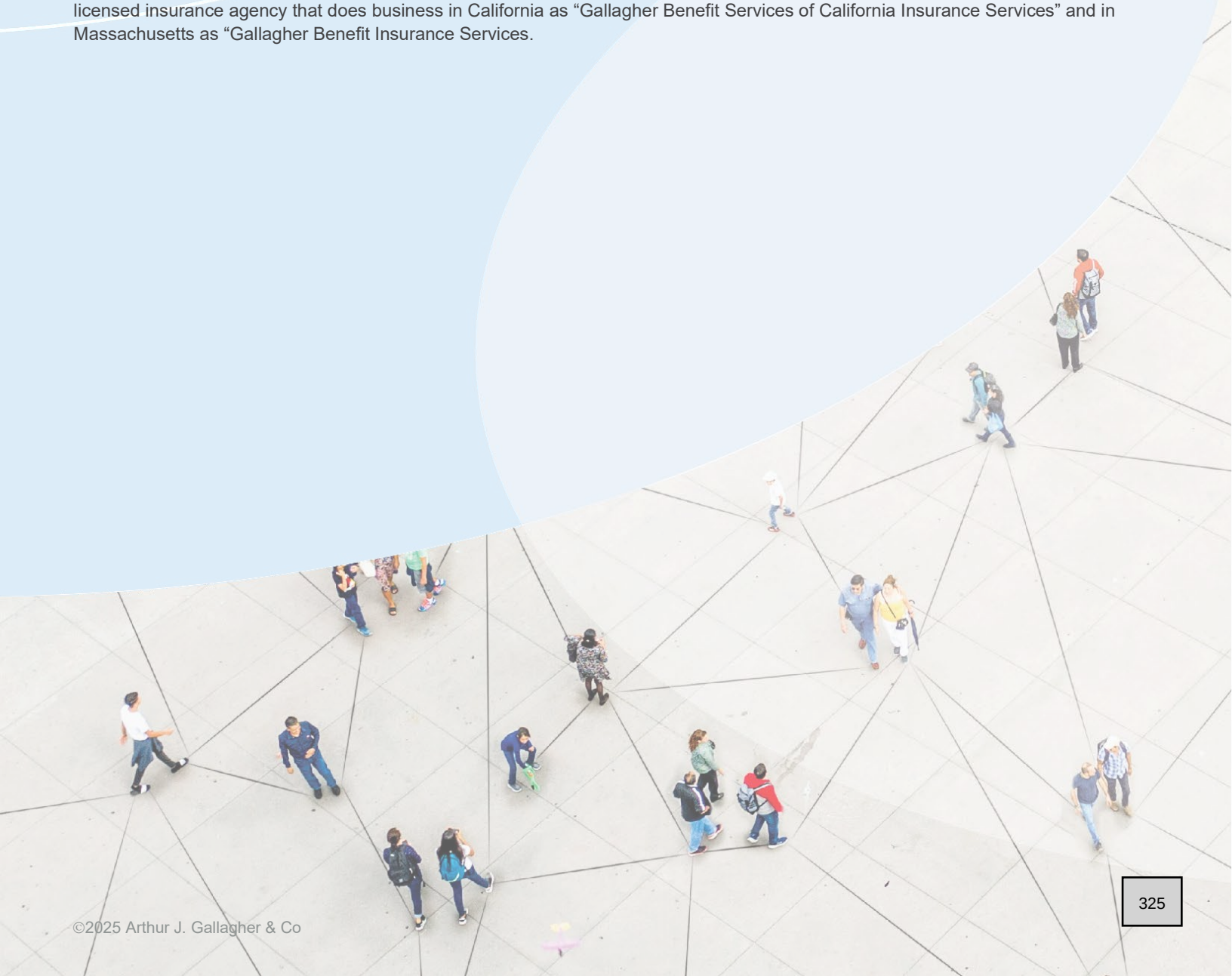
Gallagher

ajg.com **The Gallagher Way. Since 1927.**

Gallagher is pleased to submit this proposal to you. While this proposal is not meant to constitute a formal offer, acceptance, or contract, notwithstanding anything to the contrary contained in the proposal, Gallagher is submitting this proposal with the understanding the parties would negotiate and sign a contract containing terms and conditions that are mutually acceptable to both parties.

This material was created to provide accurate and reliable information on the subjects covered by should not be regarded as a complete analysis of these subjects. It is not to provide specific legal, tax or other professional advice. The services of an appropriate professional should be sought regarding your individual situation.

Consulting and insurance brokerage services to be provided by Gallagher Benefit Services, Inc. and/or its affiliate Gallagher Benefit Services (Canada) Group Inc. Gallagher Benefit Services, Inc., a non-investment firm and subsidiary of Arthur J. Gallagher & Co., is a licensed insurance agency that does business in California as “Gallagher Benefit Services of California Insurance Services” and in Massachusetts as “Gallagher Benefit Insurance Services.



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Logic Compensation Group
Total Rewards Consulting

Classification and Compensation Study

Prepared for the City of Independence, Iowa
November 20, 2025

Annette Hoefer, MBA, CCP
Principal Consultant
4395 Flagstick Drive
Marion, IA 52302
Phone: (303) 916-9180
Annette. Hoefer@LogicCompGroup.com

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PART A: TRANSMITTAL LETTER

November 20, 2025

Matthew R. Schmitz
City Manager
331 1st Street E
Independence, IA 50644

Classification and Compensation Study

Dear City Representatives:

At Logic Compensation Group (Logic Comp), we know that compensation and classification systems are not just policies and procedure—they are people strategies. When thoughtfully designed and clearly communicated, they help organizations like the City of Independence (the City) recruit great talent, retain top performers, and build an engaged, future-ready workforce. This study (project) will focus on conducting a classification and compensation study of City employees in 55 positions.

What makes us different? We lead with people-first thinking and deep expertise in the public sector. Our senior team has guided more than 250 government organizations, including several in Iowa. We intentionally take on a limited number of projects to ensure focus and responsiveness. With extensive public sector knowledge, we are easy to work with, quick to respond, and fully committed to your success.

We are excited to propose a tailored, collaborative approach for your compensation & classification study. I will be the primary contact for the proposal discussion and am responsible for negotiating all terms and conditions with the City. Our proposal is valid for a minimum of 90 days. Should you need additional information regarding this proposal, please contact me directly at Lori.Messer@LogicCompGroup.com or locally, Annette Hoefer, at Annette.Hoefer@LogicCompGroup.com or (303) 916-9180.

Respectfully,

LOGIC COMPENSATION GROUP, LLC
Lori Messer, Managing Director
112 E. Palmcroft Drive, Tempe, AZ 85282
Phone: (480) 431-4702

PART B: FIRM EXPERIENCE AND QUALIFICATIONS

Logic Comp History and Structure

Logic Compensation Group, LLC

Lori Messer, Managing Director

112 E. Palmcroft Drive

Tempe, AZ 85282

Phone: (480) 431-4702

Email: Lori.Messer@LogicCompGroup.com

- FEIN Number: 84-2864177
- URL: https://logiccompgroup.com
- 100% Woman-Owned Firm
- Limited Liability Company owned by Lori Messer
- 7 staff members
- Project Manager, Annette Hoefer, Principal Consultant, located in Marion, Iowa, (303) 916-9180

Logic Compensation Group was established with a single goal in mind: to deliver thoughtful, tailored, and people-centric compensation and classification consulting to public sector organizations. Logic Compensation Group was founded in 2019 and is a limited liability company. Our management team has over 30 years of experience in providing classification and compensation services to public sector organizations nationwide. Our Managing Director and Principal Consultant have collaborated for over 20 years.

Unlike traditional firms driven by volume, Logic Comp operates on a low-overhead, high-engagement model. That means we take on fewer projects, go deeper with each client, and ensure our recommendations are not only strategic but also practical and sustainable.

We believe that a successful classification and compensation study is both a **technical exercise and a people journey**. That's why Logic Compensation Group blends best-practice methodologies with stakeholder engagement, transparent communication, and flexibility tailored to our client's unique needs.

Our Guiding Principles

- **Partner with purpose.** We view this work as a long-term collaboration—not a handoff.
- **Align systems to strategy.** Our approach connects classification and compensation design with your mission, vision, and future workforce goals.
- **Balance market data and internal equity.** We blend external pay benchmarking with internal equity tools to ensure fairness inside and out.
- **Communicate early and often.** Transparency drives buy-in. We will support clear messaging every step of the way.

Each study is led by either our Managing Director or Principal Consultant, both of whom bring extensive, hands-on experience with public sector clients and maintain direct oversight of every deliverable. Our leadership team doesn't just manage projects; they also roll up their sleeves and handle essential technical work. That includes crafting job descriptions, conducting interviews with staff and leadership, ensuring survey completion, analyzing pay data, and presenting findings to executive stakeholders.

Because of this fully engaged model, every consultant—at every level—continuously refines their technical expertise. We stay current by holding active memberships in top professional bodies such as WorldatWork, ICMA, and PSHRA. These memberships ensure we are plugged into the latest classification and compensation trends, research, and best practices. We also utilize Technical Advisors, each with their own specific area of expertise.

Client Experience

We specialize in working with municipalities, counties, school districts, transit agencies, public safety departments, and other government entities. Our team has guided compensation and classification studies for public sector organizations ranging from 3 employees to over 10,000—and every time, we've delivered solutions grounded in clarity, collaboration, and care. The following is an abbreviated listing of our clients for which we have performed a similar scope of work. Those marked with an asterisk * are recent clients within the last 3 years.

State	Organization	State	Organization
AZ	City of Cave Creek*	NC	City of Durham*
AZ	City of Tolleson	NV	Clark County*
AZ	Creighton School District*	OR	Crook County*
AZ	Kyrene School District*	OR	Hood River County*
AZ	Town of Queen Creek*	TX	Austin Firefighter Relief Retirement System
AZ	Town of Wickenburg	TX	City of Belton*
AZ	City of Chandler*	TX	City of Deer Park
AZ	City of Surprise	TX	City of Manvel
AZ	Valley Metro*	TX	City of Iowa Colony*
CA	City of La Quinta*	TX	City of Missouri City
CO	CO Office of Legislative Legal Services*	TX	City of Morgan Point Resort
CO	Gunnison County	TX	City of Richmond
CO	La Plata County*	TX	City of Taylor*
CO	Colorado Public Defender's Office*	TX	City of Alvin*
CO	Colorado Department of Law*	TX	Dallas Police and Fire Pension System
CO	Summit County*	TX	City of Lake Jackson
CO	Town of Breckenridge	WA	City of Seattle, Civil Attorney Division*
CO	Town of Frisco*	WA	City of Seattle, Seattle City Light Department*
CO	STRIDE Community Health	WA	City of Tacoma*
IA	City of Grinnell*	WA	Community Transit*
IA	Linn County*	WA	Kitsap Transit*
IA	City of West Des Moines	WA	Port of Moses Lake*
IA	City of Johnson	WA	City of SeaTac*
IA	Cedar Rapids Community Schools	WA	North County Regional Fire Authority*
IA	Des Moines Water Works	WA	Washington State Transit Insurance Pool*
KS	City of Pittsburg	WA	Port of Tacoma*
KS	City of Tonganoxie*	WI	State of Wisconsin Attorney's Association

Client satisfaction and exceeding expectations are the mission and goal of Logic Comp consultants. Quotes from our clients include:

"You are the most talented comp consultant I have ever worked with."

"We appreciated so very much all of the hard work and help you provided us in developing a great plan for the City."

"Thanks so much for all you do for us, never forgetting to recognize your prompt and thorough analysis 😊!"

"I rate Logic Compensation Group as a 10. Logic Compensation Group has become our vendor of choice for compensation projects. They consistently produce an excellent product that can be relied on for board decision-making and union negotiations."

Resumes

Your study will be led and supported by senior professionals who bring a wealth of firsthand consulting and public sector experience.

LORI MESSER, MA, CCP – Managing Director

Study Responsibilities: Lori is the Managing Director of the firm. During the City's study, Lori will be responsible for providing quality assurance in compensation technical work. In addition. Lori will serve as an additional contact for the City. Lori is based in Tempe, Arizona.

Professional Background: Lori has over 30 years of experience in compensation, serving as both a consultant and practitioner. Lori has managed classification and compensation studies for hundreds of public sector clients throughout her career. Additionally, Lori's consultative work has involved collaborating with a diverse range of public sector organizations, including states, cities, counties, school districts, colleges and universities, and special districts. Prior to starting the firm, Lori spent seven years working as a Senior Consultant and subsequently as the West Coast Office Principal Consultant for Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. Prior to this, Lori held various consultative human resources and compensation positions in high-tech, distribution, healthcare, and local government organizations.

Lori has a bachelor's degree in business administration from Arizona State University and a master's degree in education from the University of Phoenix. She is also a member of *WorldatWork* and has earned her CCP certification. Lori also serves on the Merit Board for the City of Tempe, Arizona.

Lori has acted as study manager on some of our largest studies, including:

- Clark County (Nevada)
- City of Chandler (Arizona)
- Valley Metro (Arizona)
- Scottsdale Unified School District (Arizona)
- Seattle City Light (Washington)
- City of Tacoma (Washington)
- Town of Cave Creek (Arizona)
- City of Surprise (Arizona)

ANNETTE HOEFER, MBA, CCP – Principal Consultant

Study Responsibilities: Annette is a Principal Consultant of the firm. During the City's study, Annette will provide overall study management, act as the key consultant on the classification phase, and oversee all study deliverables. Annette is based in Marion, Iowa.

Professional Background: Annette has spent 30 years performing classification and compensation studies as a Senior Consultant with Lee & Burgess Associates, Fox Lawson & Associates, and Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. Clients include cities, counties, states, and special districts such as utility and transit organizations. She has also occupied human resources positions in the healthcare, energy, and insurance industries as a compensation specialist.

Annette earned her bachelor's and master's degrees in business administration from the University of Iowa and her CCP certification. She has also previously served as a board member for the Rocky Mountain Compensation Association.

Annette has acted as study manager on the following studies, including:

- City of Durham (North Carolina)
- Kyrene School District (Arizona)
- Linn County (Iowa)
- City of Grinnell (Iowa)
- Des Moines Water Works (Iowa)
- City of Seattle Civil Division (Washington)
- State of Colorado Public Defender's Office (Colorado)
- State of Colorado Department of Law (Colorado)
- Community Transit (Washington)

ANDREA GILLMORE, MSC, PMP - Consultant

Study Responsibilities: Andrea is a Consultant of the firm. During the City's study, Andrea will serve as the key consultant for the compensation phase. Andrea is based in Phoenix, Arizona.

Professional Background: Andrea has over 15 years of experience serving state, county, and municipal public sector agencies in California and Arizona. Andrea specializes in management and human resources support, with a focus on compensation and study management over the past six years. Andrea has successfully completed multiple classification and compensation studies in the public sector. She understands the nuances and unique requirements that accompany government organizations, bringing a dedication and passion for developing custom solutions to meet stakeholder needs.

Andrea has a bachelor's degree in psychology from the University of Phoenix and a master's degree in counseling from the same institution. She is also a certified Project Management Professional (PMP).

MADELINE THOMAS, BS – Consultant

Study Responsibilities: Madeline will provide additional support for all phases of the City's study. Madeline is based in Sacramento, California.

Professional Background: Madeline attended Arizona State University, earning a bachelor's degree in mathematics with a specialization in statistics. She is instrumental in managing our data capabilities and has worked in public sector consulting for over 3 years. Madeline is currently pursuing her CCP certification from *WorldatWork*.

KAREN WELCH, MBA, PMP – Consultant

Study Responsibilities: Karen will provide support for both the compensation and classification phases of the City's study. Karen is based in Phoenix, Arizona.

Professional Background: Prior to joining the firm, Karen spent over two years working as a classification and compensation consultant for Gallagher Benefit Services' Human Resources and Compensation Consulting. Karen has direct experience supporting public sector and non-profit clients across the country in the performance of classification and compensation studies.

With that practical knowledge, combined with over 30 years of business experience, Karen understands the tremendous effort that it takes for organizations to identify, transform, and achieve their goals.

Karen has a bachelor's degree in business from Northern Arizona University and a master's in business administration from the University of Phoenix. Karen is also a certified Project Management Professional (PMP).

BRUCE G. LAWSON, MPA, CCP, IPMA-SCP – Technical Advisor

Study Responsibilities: Bruce serves as a Technical Advisor to the firm, providing technical direction and ensuring quality assurance on client studies. Bruce is based in Phoenix, Arizona.

Professional Background: Bruce has directed and performed classification and compensation studies for more than 35 years, both domestically and internationally. Bruce was a founder and Managing Partner with Fox Lawson & Associates LLC. Prior to forming Fox Lawson, he spent 15 years with Ernst & Young LLP, where he served as the National Director of their public sector compensation consulting practice. Bruce was a past National Managing Director for Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. He also served as City Manager in two California cities (Los Altos Hills and Belvedere), was the County Administrative Officer in Multnomah County in Portland, Oregon, Assistant City Manager/Personnel Director in Corvallis, Oregon, and Assistant to the City Administrator/Personnel Director in Placentia, CA.

Bruce has a master's degree in public administration from California State University at Fullerton, is a.b.d. in public administration from Golden Gate University in San Francisco and has earned his CCP certification from *WorldatWork*. He is also a member of several professional associations, including the College & University Professional Association for Human Resources, ICMA, PSHRA, the Society for Human Resources Management, and *WorldatWork*.

SANDY SPELLMAN, MBA – Technical Advisor

Study Responsibilities: Sandy provides technical review on communications and classification activities. Sandy is based in Tempe, Arizona.

Professional Background: Sandy has over 30 years of experience in comprehensive consulting with public sector organizations. She has conducted studies for over 15 years and specializes in areas such as classification, communications, human resource strategy and process, performance management, and employee and management focus group meetings. Sandy has worked with several types of organizations, including state, city, county, college, university, and federal government entities. Prior to joining the firm, Sandy was a Senior Consultant at Gallagher Benefit Services' Human Resources and Compensation Consulting public sector practice. Prior to Gallagher, she spent 18 years with Ernst & Young's consulting practices, where she was responsible for client and internal change management, communications, and training strategies. She has also held state executive and legislative positions addressing a wide range of human resources and related issues.

Sandy holds a bachelor's degree in Sociology and Political Science from Arizona State University, as well as a master's degree in Public Administration with an emphasis in Organizational Development from the same institution.

PART C: PROJECT APPROACH AND WORK PLAN

Project Objectives

For a comprehensive classification and compensation study, you need an experienced partner to identify, implement, evaluate, and guide your options. Effective programs help recruit, retain, and reward top employees while managing costs. Our strategy employs proven methods, utilizes highly qualified staff, and adopts a responsive approach to deliverables. We adapt our activities as needed, utilizing an agile process with frequent feedback loops to help you achieve your goals.

This comprehensive classification and compensation study will encompass approximately 55 positions. The study will consist of 5 phases, as outlined below. The work plan we present is based on decade's long experience and best practices and may or may not correspond directly to the RFP's proposed Scope of Services. However, within each phase, the City's intended tasks have been identified. Logic Comp's understanding of the objectives of the study is as follows:

- Ensure internal equity by creating a classification structure that incorporates logical career paths and utilizes a City-selected job evaluation system.
- Conduct a total compensation survey assessing market competitiveness and forming the basis for new compensation system and benefit program recommendations that are understandable and easy to administer.
- Create a total compensation philosophy addressing the City strategies for obtaining its objectives.
- Ensure that the resulting system and outcomes are compliant with applicable regulations and laws.
- Create and cost a multi-year implementation plan and maintenance plan for the City.

Please find the detailed project schedule following the Work Plan.

Work Plan

Phase I: Project Initiation and Orientation

We begin by listening—understanding the City's objectives, history, structure, and any existing pain points. In the first step of the study, Logic Comp will work closely with the City to set goals and ensure the study runs smoothly, stays on schedule, and remains within budget. Our approach focuses on understanding your organization's pay philosophy and market strategy. This helps us create a clear plan for aligning your pay structure with your goals. By understanding where your organization wants to position itself in the job market, we can design fair and competitive pay systems that meet your needs.

To keep you updated, we will hold bi-weekly meetings with the City's project manager or team. These meetings will help track progress and address any questions or concerns along the way. During this phase, we will:

- (3.1.1) Hold a study kickoff with stakeholders and department heads called the Study Team to confirm goals, the schedule, and milestones
- (3.1.2) Review job descriptions, pay structures, benefits programs, org charts, policies and procedures, contracts, and other related information
- (3.3.1) Update or develop a tailored classification and compensation philosophy
- Launch bi-weekly video check-ins with the City's Study Team

- (3.1.3) Design a stakeholder communication plan and PAQ (Position Analysis Questionnaire) orientation materials, including a video if requested
- Conduct employee PAQ and study introduction presentations

> Key Deliverables:

- Study Team meeting
- Detailed updated study schedule
- Philosophy document
- Communication plan
- Position Analysis Questionnaires (PAQ) form
- Employee PAQ presentations

> Staff Allocation: 90% Principal Consultant, 10% Consultant

> On-Site Visits: 1 to 2 days

Phase II: Classification and Job Analysis

Classification involves understanding, verifying, and describing the nature and level of work within the organization. Data is gathered from existing job descriptions, employee-completed Position Analysis Questionnaires (PAQs), and individual and group employee interviews called focus groups. Recommended updates to the classification structure will be provided to the City, ensuring alignment with the organization's strategy and promoting appropriate career paths. Logic Comp consultants will discuss these recommendations with the City, making adjustments as needed.

Logic Comp will update and develop City job descriptions in a format approved by the City. The job descriptions will adhere to best practices and legal requirements, including the Americans with Disabilities Act and Equal Pay Act. Additionally, Logic Comp will make FLSA status recommendations for each classification.

Logic Comp will explore options with the City for managing internal equity among jobs, known as job evaluation. Options will be presented during the study initiation meeting for the organization's consideration. The selected method will be applied to approved job classifications to establish internal job alignment and, where appropriate, create career paths

for various positions. Training will be provided for City staff responsible for maintaining the system. The results of the job evaluation will be integrated with market data obtained in Phase III to develop new or updated pay structure(s). In this phase, we define the structure of work across the City. This involves:

- (3.2.1) Developing and reviewing completed PAQs
- (3.2.1) Conducting group or individual employee interviews or focus groups
- (3.2.3) Recommending classification structure and career path updates and FLSA status, and meeting with the City to discuss
- (3.2.2 and 3.4.2) Updating job descriptions
- (3.2.3) Applying a structured job evaluation methodology (e.g., Logic Leveling™)

> Key Deliverables:

- Updated class structure
- Employee focus groups
- Job evaluation results and training
- Job description updates
- FLSA recommendations

> Staff Allocation: 70% Principal Consultant, 30% Consultant

> On-Site Visits: Up to 4 days

Phase III: Compensation and Benefits Analysis

Now we look outward—examining how the City's pay and benefits practices compare to the labor market. Through the survey process, data are gathered and analyzed to develop an updated pay system for City classifications. Logic Comp will work with the City to identify comparator organizations and benchmark jobs to include in the survey process.

A survey is created to collect the necessary data for comparing pay and benefits. This survey will be distributed to an approved list of comparator organizations. Private sector survey data may also be incorporated by using credible published survey sources, such as the Economic Research Institute's salary database, or by direct survey, as specified in the City's RFP.

Logic Comp will ensure the accuracy of received data and conduct a competitive analysis. Updated pay structure(s) will be developed based on market data and an assessment of internal job relationships. Benefit program comparisons will also be made. Logic Comp will provide implementation strategies and discuss with the City how it can transition from the existing system to the updated system. Logic Comp will also review and provide updated and aligned guidelines in managing individual pay and maintaining the pay system.

- (3.3.1) Identify benchmark jobs and comparator organizations
- (3.3.2) Develop and distribute a custom salary survey with approximately 55 classifications and selected benefits programs surveyed
- Analyze pay and benefits compensation practices and make recommendations
- (3.3.3, 3.4.1 and 3.4.3) Develop an updated pay plan(s) and provide up to 3 implementation strategies including compression analysis

> Key Deliverables:

- Survey
- Market survey summary
- Recommended pay structure(s)
- Benefits comparisons and recommendations
- Implementation and cost modeling

> Staff Allocation: 30% Principal Consultant, 70% Consultant

> On-Site Visits: 1 day

Phase IV: Final Reporting and Implementation

We pull it all together—providing documentation, tools, and training to move forward confidently. A study report is prepared and presented by Logic Comp summarizing the processes of the study and the related findings and recommendations. Logic Comp consultants will provide in-depth explanations and deliverables throughout the process, and the final report will compile the comprehensive results of all study activities.

Following discussions with the City, the comprehensive report will be finalized. The final report will be presented to City administration by experienced Logic Comp consultants who have been involved in the study at each stage.

Logic Comp consultants will collaborate with the City to ensure the system can be managed independently after the study's completion. City staff responsible for managing the new system will receive detailed education and participate in the study wrap-up with members of the Logic Comp team. This involves:

- (3.4.2) Draft and present a comprehensive report for City review, including survey data
- Finalize recommendations based on feedback
- (3.4.3) Train City on system maintenance and future adjustments
- (3.4.2) Review and update of related policies and procedures
- (3.4.3) Present results to leadership and City Council

> Key Deliverables:

  - Final report (Word or PowerPoint)
  - Implementation guidance
  - City education
  - Updated policies and procedures

> Staff Allocation: 50% Principal Consultant, 50% Consultant

>On-Site Visits: 1 day

Phase V: Ongoing Client Support

Our relationship does not end with the delivery of the final report. Logic Comp focuses on long-term, quality client relationships. For 12 months after study completion, we provide complimentary:

- Quarterly check-ins to support implementation
- On-call guidance for emerging issues or questions

- If the City needs additional help down the road, like new classifications or policy reviews, we are happy to provide support based on our hourly rates for that as well. But for the core study—we are in it together, start to finish.

> *Key Deliverables:* Touchpoint conversations, follow-up advice, optional extended services

>Staff Allocation: 100% Principal Consultant

Quality Assurance Approach

Quality is a non-negotiable at Logic Compensation Group. We embed quality checks throughout each phase, not just at the finish line.

Here is what that looks like in practice:

- **Peer review:** Every major deliverable is reviewed by at least two consultants.
- **Team-wide visibility:** Our team collaborates using shared study logs, so each member has context and clarity.
- **Client clarity:** We present interim deliverables in digestible pieces so the City can ask questions and offer input without waiting until the end.
- **Documentation & transparency:** From survey tools to job evaluations, we provide explanations and clear audit trails for all methodologies used.
- **Sustainability:** We don't just deliver a final product—we empower City teams with the knowledge and tools to manage it going forward.

Your Role: Partners in Success

To make this a smooth and successful process, we will ask you to collaborate with us in a few key ways:

- Provide access to current org charts, pay plans, policies, job descriptions, and other requested documentation
- Help coordinate internal communication and employee participation
- Schedule and participate in meetings, interviews, and department check-ins

- Review and approve deliverables at key study milestones
- Complete survey and assist with participant contacts
- Share internal feedback with Logic Comp as a single, consolidated response

We will provide templates, timelines, and structure to make all of this simple and straightforward. You bring the insights, and we will handle the heavy lifting.

Project Schedule

To support the proposed scope of work, we've prepared a detailed schedule for each phase. This schedule represents the typical amount of time our clients spend conducting a study of this type. This schedule can also easily be shortened based on client priorities and will be updated according the City's specific needs during Phase 1 because we know that best laid plans can change for our clients. Staff allocations are shown under each Phase of the Work Plan.

Classification & Compensation Study		Actual Timeline Project Duration	Start Date	End Date
City of Independence Iowa		217	Jan 19	Aug 24

Phase 1: Project Initiation

Task Item	Logic Comp or Client	Task Duration	Start Date	End Date
Project Initiation & File Setup	Logic Comp	10	Jan 19	Jan 30
Hold Initial Project Meeting	Logic Comp & Client	5	Jan 19	Jan 23
Client Provide Information per Materials Request	Client	10	Jan 19	Jan 30
Establish Draft Project Timeline	Logic Comp	5	Jan 19	Jan 23
Schedule Initial On-site Meetings	Logic Comp & Client	5	Jan 19	Jan 23
Prepare and Review Materials for On-site Meetings including PAQ	Logic Comp & Client	11	Jan 26	Feb 9
Hold On-Site Meetings	Logic Comp & Client	5	Feb 9	Feb 13
Compensation Philosophy Developed & Approved including Labor market	Logic Comp & Client	10	Feb 9	Feb 20
Communication Plan Recommendations Provided and Approved	Logic Comp & Client	10	Feb 9	Feb 20
Phase 1 Report Developed and Approved	Logic Comp & Client	11	Feb 20	Mar 6
			Jan 19	**Mar 6**

Phase 2: Classification and Job Analysis

Task Item	Logic Comp or Client	Task Duration	Start Date	End Date
Client Distributes & Collects PAQs	Client	20	Feb 9	Mar 6
Set Up SharePoint Folders to Receive PAQs	Logic Comp	5	Feb 9	Feb 13
Review Existing Materials & PAQs	Logic Comp	10	Mar 9	Mar 20
Employee Focus Groups	Logic Comp & Client	5	Mar 23	Mar 27
Develop and present Class Recommendations	Logic Comp	8	Mar 30	Apr 8
Apply Job Evaluation	Logic Comp			
Client Review of Draft Class Structure	Client	8	Apr 8	Apr 17
Incorporate Feedback and Finalize Class Recommendations	Logic Comp	6	Apr 17	Apr 24
Provide FLSA Recommendations	Logic Comp	6	Apr 24	May 1
Draft and Approve Job Description Format	Logic Comp & Client	1	May 1	May 1
Compose and Review Job Descriptions	Logic Comp	56	May 1	Jul 17
Draft Phase 2 Report Delivered and Approved	Logic Comp & Client	9	May 1	May 13
			Feb 9	**Jul 17**

Phase 3: Compensation and Benefits Analysis

Task Item	Logic Comp or Client	Task Duration	Start Date	End Date
Draft Survey Developed and Approved	Logic Comp	9	May 1	May 13
Client Send Email to Comparator Orgs	Client	1	May 13	May 13
Distribute Survey to Participants	Logic Comp	1	May 18	May 18
Surveys Due	Logic Comp	15	May 18	Jun 5
Survey Extension	Logic Comp	6	Jun 5	Jun 12
Data Validation & Analysis	Logic Comp	13	Jun 12	Jun 30
Draft Data Review of Information	Logic Comp	1	Jun 30	Jun 30
Draft Proposed Pay Structure & Allocate Jobs into Structure and Approval	Logic Comp	9	Jun 30	Jul 10
Draft Costing Options	Logic Comp	5	Jul 13	Jul 17
Client Review & Approval Pay Plan and Costing	Client	5	Jul 20	Jul 24
Draft Phase 3 Report and Approval	Logic Comp	7	Jul 24	Aug 3
			May 1	**Aug 3**

Phase 4: Final Report and Implementation

Task Item	Logic Comp or Client	Task Duration	Start Date	End Date
Review and update related policies and procedures	Logic Comp	11	Jul 24	Aug 7
Draft Phase 4 Report for Final Report	Logic Comp	6	Aug 7	Aug 14
Client Review & Feedback or Approval of Phase 4 Report	Client	6	Aug 14	Aug 21
Final Report Delivered	Logic Comp	1	Aug 24	Aug 24
Report made to Council and stakeholders	Logic Comp & Client		TBD	TBD
Develop Participant Report	Logic Comp	6	Aug 3	Aug 10
Distribute Participant Report	Logic Comp		TBD	TBD
			Aug 3	**Aug 24**

Sample Job Description and Report

Please refer to Appendix B. The job description and report are proprietary and intended solely for the designated client and may be shared only with authorized City of Independence representatives involved in evaluating consultant proposals. As with all our engagements, our analyses, recommendations, reports, and timelines are customized to address the unique needs of each client.

PART D: REFERENCES

Reference 1:

Client Name:	Linn County Iowa
Contact Person & Title:	Lisa Powell Human Resources Director
Phone:	(319) 892-5124
Email:	Lisa.Powell@linncountyiowa.gov
Brief Description of Project:	Since 2010, Annette Hoefer has provided services to this Midwest county, including reviewing performance management systems, developing an exceptional contribution plan, serving as a member of the oversight team, conducting job audits and evaluations, and conducting market studies. In 2018, Annette led a classification and compensation study for the County's management jobs, resulting in all recommendations being accepted by the Board of Supervisors. In 2021, 2023, and 2024, studies of bargaining unit jobs were completed. Annette continues advising the County's exceptional contribution committee on other classification and compensation issues. She is currently providing consulting services for the County's job update process in addition to conducting the first County-wide compensation study in over 30 years.

Reference 2:

Client Name:	Des Moines Water Works
Contact Person & Title:	Doug Garnett Director of Human Resources
Phone:	(515) 323-6211
Email:	garnett@dmww.com
Brief Description of Project:	This year, Logic Comp has conducted two pay studies for 1) non-represented jobs and 2) redesigned information technology jobs. The IT study also included job evaluation activities and alignment of the new jobs with the market.

Reference 3:

Client Name:	City of Tonganoxie, KS
Contact Person & Title:	Dan Porter Assistant City Manager
Phone:	(913)845-2620
Email:	dporter@tonganoxie.org
Brief Description of Project:	In 2021 and 2024, Logic Comp conducted a compensation study for this small, but growing Kansas City adjacent municipality. The first study resulted in the development of a formal pay structure and the second resulted in an update to that structure to meet the organization's changing needs.

PART F: ACKNOWLEDGEMENT FORM/SECTION 4

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY List Addenda Numbers received: Addendum No. 1 and Addendum No. 2

The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.

2. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
3. The individual signing below is authorized to bind the firm to a contract.

Signature:	
Printed Name:	Lori Messer
Title:	Managing Director
Date:	11/15/2025

CONCLUSION

At Logic Compensation Group, we take pride in our team of seasoned experts specializing in classification and compensation for public sector organizations. Our mission is to provide exceptional client interaction and tailored services that stand out from the consulting crowd. We are excited about the prospect of being your go-to resource for this project and for supporting your organization's needs in the years ahead.

APPENDIX A: PROPOSAL SUBMITTAL FORMS

Section 1: Proposing Firm Information

Official Firm Name:	Logic Compensation Group, LLC
Mailing Address:	112 E. Palmcroft Drive Tempe, AZ 85282
Website:	www.logiccompgroup.com
Year Firm Established:	2019
Office Location Performing the Work:	Marion, Iowa
Primary Contact Person:	Lori Messer
Title:	Managing Director
Phone:	(480)431-4702
Email:	Lori.Messer@LogicCompGroup.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [X] One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.
- [X] One (1) sealed envelope containing the Cost Proposal , clearly marked on the exterior with: "SEALED COST PROPOSAL – SALARY STUDY".

Technical Proposal Contents:

- [X] Part A: Transmittal Letter: A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [X] Part B: Firm Experience and Qualifications:
  - [X] Firm history, size, and ownership structure.
  - [X] Detailed experience with public sector classification and compensation studies.
  - [X] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [X] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [X] Part C: Project Approach and Work Plan:
  - [X] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [X] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [X] A sample of a final report from a previous, similar municipal project.
  - [X] A sample of a job description from a previous, similar municipal project.
- [X] Part D: References:
  - [X] At least three (3) references from public sector clients (use Section 3 of this form).
- [X] Part F: Acknowledgement Form (Section 4 of this form): Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [X] All - inclusive, "not - to - exceed" total project cost.
- [X] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [X] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Please see Part D: References.

APPENDIX B

Sample Job Description

Human Resources Technician

CLASS SERIES	BAND/GRADE/SUBGRADE	FLSA STATUS
Human Resources	B22	Non-Exempt

CLASS SUMMARY:

This class is a stand-alone class in the Human Resources series. Incumbents perform a variety of responsible paraprofessional and technical human resources support duties associated with recruitment and employee separation, compensation and classification, benefits administration, employee recognition programs, records maintenance, and risk management activities.

DISTINGUISHING CHARACTERISTICS:

Positions assigned to this classification perform journey-level human resources support functions requiring solid knowledge of transactional and/or operational standards for completing tasks and assignments of a varied nature.

ESSENTIAL DUTIES:

This class specification represents only the core areas of responsibilities; specific position assignments will vary depending on the department's needs.

- Schedules and coordinates recruitment and testing activities; posts advertisements; proctors exams; prepares interview materials; and notifies candidates of status.
- Coordinates pre-employment process including background checks and medical examinations for prospective employees.
- Prepares and processes documents necessary for hiring, separation, transfer, and other related employment activities.
- Assists with coordinating department and/or management activities, project schedules, relaying communications, researching information and providing related support.
- Compiles, formats and proofs complex documents, reports and other written materials.
- Conducts and coordinates onboarding for new employees, promotions, board and commission members, elected officials, and volunteers including preparing and processing all documents and reviewing for accuracy and completeness.
- Administers employment eligibility verification; and maintains accurate files.
- Ensures accurate recordkeeping and destruction of all employment-related documents.
- Processes insurance enrollment changes and works with benefit providers to resolve employee discrepancies or issues; verifies employee and dependent plan eligibility; answers questions regarding benefits, open enrollment, and related benefits information.
- Reviews, verifies, and processes personnel actions and related documents, including entering information into software and updating and maintaining various databases.
- Receives and processes leave documentation in accordance with applicable federal and state laws and regulations.

- Provides administrative support for HR matters, including responding to general inquiries, preparing correspondence, memoranda, reports, processing mail, performing data entry, and maintaining various schedules, records, and logs.
- Prepares and processes department agreements, contracts, and purchase order requisitions including processing invoices.
- Responds to routine salary survey requests, verification of employment, and employment records requests.
- Performs related duties as assigned.

MINIMUM QUALIFICATIONS:

Education and Experience

High School Diploma or GED and two (2) years of human resources experience; or an equivalent combination of education and experience sufficient to successfully perform the job's essential duties.

Licensing/Certifications

- None

KNOWLEDGE OF:

- Documentation and record keeping principles.
- Customer service principles.
- Basic recruitment principles and practices.
- Basic benefits administration principles and practices.
- Human Resources practices and principles.
- Applicable software (HRIS) systems and applications.
- Modern office procedures and equipment.
- Proper English usage, grammar, and punctuation.
- Customer service principles.
- Applicable local, state, and federal laws, rules, and regulations.

SKILL IN:

- Providing customer service.
- Maintaining confidentiality.
- Preparing written reports and documents.
- Maintaining accurate and confidential records.
- Reviewing documents for completeness and accuracy.
- Comprehending and correctly interpreting a variety of informational documents.
- Performing basic math computation such as addition, subtraction, multiplication, and division.
- Operating a computer and relevant software applications.
- Applying applicable local, state, and federal laws, rules, and regulations.
- Operating modern office equipment.
- Maintaining effective working relationships with peers, public, and staff.
- Communication and interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.

WORKING CONDITIONS/PHYSICAL DEMANDS:

Positions in this class typically require: standing, sitting, walking, reaching, handling, fine dexterity, vision, hearing, and talking.
Sedentary: Exerting up to 10 lbs. occasionally or negligible weights frequently, sitting most of the time.

Incumbents in this position work in an indoor office environment and may experience sitting for extended periods of time.

NOTE:

The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the department's business needs.

Compensation Study Report

Prepared for the City of Organization

April 2024

SECTION 1: STUDY INTRODUCTION

The City of Organization engaged Logic Compensation Group (LCG) to conduct a salary survey to provide results that will be utilized to update the City's compensation system, which was established previously. The objectives of the study include the update of the compensation structures that:

- Establishes fair and equitable compensation relationships within the organization.
- Relates compensation to relevant market conditions outside the organization.
- Considers longevity and tenured employees relative to the City's pay ranges.

Specifically, the Logic Compensation Group was asked to:

- Evaluate the City's present wage structure to comparable positions in similar communities.
- Update current pay ranges due to City changes.
- Review internal equity between positions within the City.

The study encompassed 15 City job titles and included the following phases conducted between December 2023 and April 2023:

1. Study Initiation
2. Compensation Survey
3. Study Recommendations and Reports
4. Program Maintenance and Client Support

Phase 4, Program Maintenance and Client Support, is conducted quarterly over 12 months following study completion and implementation.

This report outlines the phases, processes, findings, and recommendations of the City's study. LCG has enjoyed working with the City in conducting this important study and is committed to continuing our partnership.

Your Logic Compensation Group Team:

Annette Hoefer, Principal Consultant
Madeline Messer, Associate Consultant
www.LogicCompGroup.com

SECTION 2: STUDY STEPS AND RESULTS

Logic Compensation Group believes that the most successful compensation studies are those developed with the active participation of the organization's staff. The City's compensation plan should complement the organization's operating characteristics, philosophy, needs, objectives, and environment.

Therefore, our approach consisted of a series of logical and interrelated activities that provided City input throughout the study. The activities and results associated with the compensation study are detailed in the following sections.

PHASE 1: STUDY INITIATION

OBJECTIVES

This phase focused on managing the study relationship between Logic Compensation Group and the City of Organization, understanding the current compensation system, and developing a framework to guide the remainder of the study. This phase outlined a roadmap for completing the study and the parameters surrounding how the study would be conducted.

PROCESS & METHODOLOGY

During the study initiation phase, LCG met with the City's designated Study Team, which consisted of the following individuals:

City Manager: **NAME**
Assistant City Manager: **NAME**

The purpose of the meeting was to review the City's current classification and compensation programs to identify areas and aspects that appear to work well for the City and those areas of concern. Discussions were centered on changes to the City's compensation plan, job descriptions, study timeline, and City needs moving forward.

Study team meetings were scheduled to allow the LCG consultants and the City to discuss and review study progress, make timely decisions, and address any questions or concerns.

OUTCOMES & DELIVERABLES

Following the study initiation activities conducted with the City's Study Team, the following activities were completed:

- Identified the 20 organizations below as market comparators from which to collect survey data. These organizations were identified as comparators as they are organizations with which the City competes for qualified personnel, are located in a similar geographic area, offer similar services, and/or are of a similar size based on population. The following 20 organizations were surveyed:

Surveyed Organizations
City of Basehor, KS
City of Bonner Springs, KS
City of De Soto, KS
City of Edgerton, KS
City of Edwardsville, KS
City of Eudora, KS
City of Goddard, KS
City of Lansing, KS
City of Louisburg, KS
City of Merriam, KS
City of Mission, KS
City of Mulvane, KS
City of Osawatomie, KS
City of Paola, KS
City of Peculiar, MO
City of Pleasant Hill, MO
City of Roeland Park, KS
City of Spring Hill, KS
Douglas County, KS
Leavenworth County, KS

PHASE 2: COMPENSATION SURVEY

OBJECTIVE

Logic Compensation Group developed a salary survey covering 15 City jobs. The survey collected information on actual salaries and salary ranges for these benchmark jobs, as well as organizational information.

Updated compensation plans were developed by coordinating the compensation study results with a review of the internal alignment of the City's jobs.

PROCESS & METHODOLOGY

The purpose of the data collection and analysis phase of the compensation study was to collect market data that would provide the desired information for comparison to the City and inform LCG's analysis and resulting recommendations to the City.

Developed Survey Parameters and Document

At the directive of the City's Study Team, 15 jobs were included in the survey as benchmark jobs. Market data compiled for these benchmark classifications were utilized to determine the City's competitive market position of current pay levels and update the City's pay plan.

Targeted organizations in Kansas and Missouri were identified as the City's labor market. Comparator organizations identified during the Study Initiation phase are shown in the table on the following page. Sixteen of 20 organizations responded to the survey. This represents an 80% survey participation rate, indicating a high survey participation level.

Comparator Market Organizations Surveyed

Surveyed Organizations	Participation Status
City of Basehor, KS	Active Participation
City of Bonner Springs, KS	Active Participation
City of De Soto, KS	Active Participation
City of Edgerton, KS	Active Participation
City of Edwardsville, KS	No Response
City of Eudora, KS	Active Participation
City of Goddard, KS	No Response
City of Lansing, KS	Active Participation
City of Louisburg, KS	Active Participation
City of Merriam, KS	Active Participation
City of Mission, KS	Active Participation
City of Mulvane, KS	No Response
City of Osawatomie, KS	Active Participation
City of Paola, KS	No Response
City of Peculiar, MO	Active Participation
City of Pleasant Hill, MO	Active Participation
City of Roeland Park, KS	Active Participation
City of Spring Hill, KS	Active Participation
Douglas County, KS	Active Participation
Leavenworth County, KS	Active Participation

LCG, in consultation with the City's Study Team, developed a customized survey document that was distributed to the public sector organizations identified in the table above.

The custom survey document covered 15 benchmark jobs. To assist comparator organizations in determining appropriate job matches based on duties and responsibilities rather than on job title alone, the survey document also contained job description summaries, FLSA status, supervision exercised, and required minimum qualifications for each benchmark job.

The survey document was previously submitted to the City under separate cover. Benchmark jobs are listed below.

Benchmark Jobs

Benchmark	2023	2021
Administrative Assistant	X	X
Utility Billing Coordinator	X	X-Clerk
Assistant City Manager	X	X
Firefighter	X	X
Fire Lieutenant	X	
Fire Captain	X	X
Police Clerk	X	X
Police Officer	X	X
Police Corporal	X	
Police Sergeant	X	X
Police Chief	X	X
Maintenance Worker II	X	X
Maintenance Worker III	X	
Utilities Operator I	X	X
Utilities Operator II	X	

LCG consultants emailed the survey document to the surveyed organizations and continued to follow up with comparator organizations by email and telephone to confirm participation, answer questions, and validate comparator information. Prior to the distribution of the survey, the City's Assistant City Manager emailed the comparator organizations asking for survey participation.

Upon receipt of completed surveys, LCG performed the following activities to ensure data integrity and appropriate matching of jobs by comparator organizations:

- Reviewed all data submitted by comparator organizations;
- Performed outlier analysis to identify any extreme data; and
- Performed follow-ups with comparator organizations to clarify and validate any questions regarding data submitted.

Survey Data Results

Following the quality assurance review, LCG compiled and provided to the City:

- Individual market data sheets detailing the market results for each benchmark job
- An aggregate assessment of how the City compared to the comparator market.
- Under separate cover, LCG delivered the market data sheets and aggregate summary results to the City for review, which served as an additional step in the validation and quality assurance process.

The overall results of the survey are summarized below.

Summary of Comparator Organization Demographics and Comparisons

The table below summarizes the demographic characteristics of the City of Organization and the comparator market organizations.

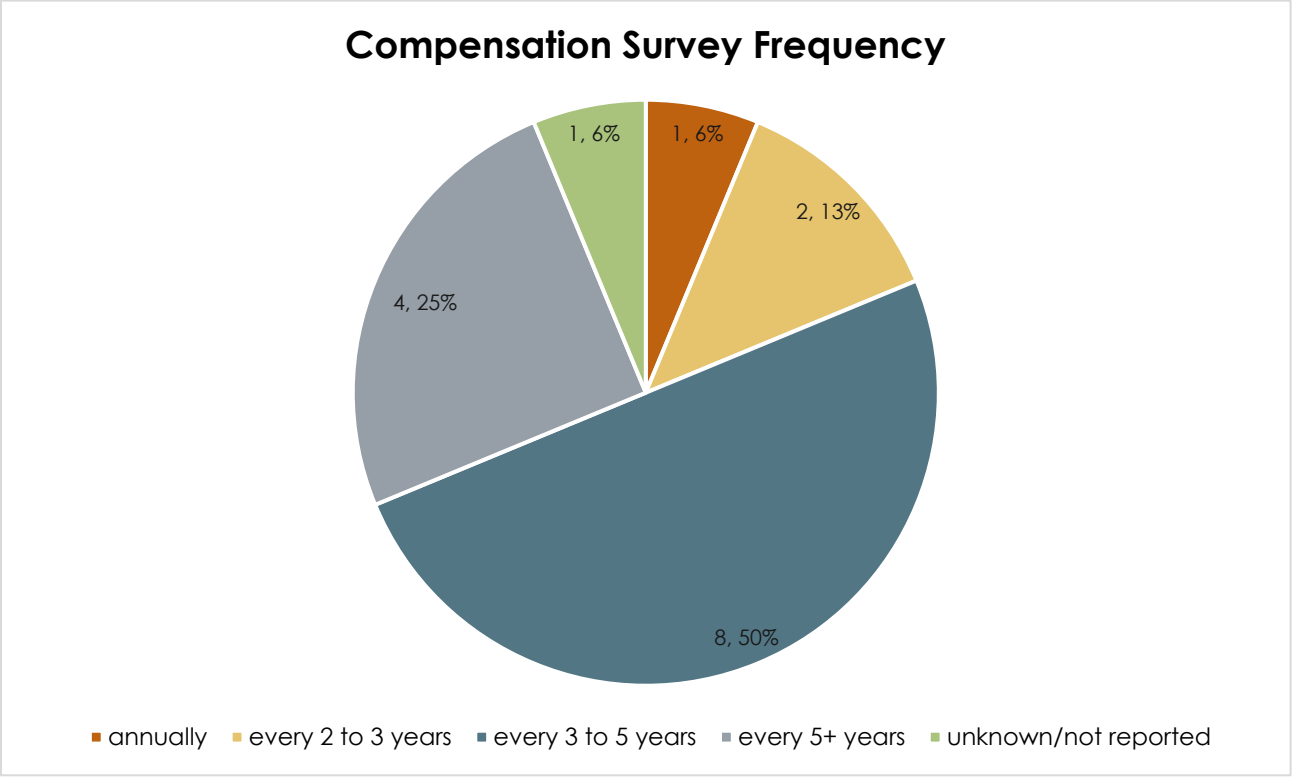
Organizational Data Summary

Organization Data	Total Customers	Total FTEs	# Job Titles
City	**5,850**	**37**	**25**
AVERAGE	19,069	106	101
% of Market	30.7%	35.0%	24.8%
MEDIAN	7,675	50	39
% of Market	76.2%	74.7%	64.1%
LOW	1,748	27	24
HIGH	120,000	500	744

Note: figures include County organizations

Summary of Market Salary Survey Frequency

The chart below summarizes the frequency of compensation surveys by the participating market organizations. The City indicated a compensation survey frequency of every 3 to 5 years.



Salary Data Results and Comparisons

Discussions regarding pay strategy and pay targets occurred in Phase I of the project. The City last conducted a comprehensive compensation analysis in 2021. The salary data collected during the survey was analyzed according to the City's pay strategies outlined below.

> **For General jobs:** The City strives to provide pay ranges that are comparable to the ***median*** of its selected labor market (all organizations surveyed). The median of ***actual salaries*** paid in the City's identified labor market (known as the pay target) will serve as the basis for updating the City's pay range midpoints for non-sworn positions. This strategy establishes pay ranges that reflect actual pay within the market in which the City competes for talent. The midpoint represents the fully functional job rate within the respective pay range.

For Police Jobs: Determined during the last pay study, the City strives to provide a highly competitive starting salary for its Police Officers to attract talent and will utilize the ***75th percentile*** of the market ***pay range minimum*** to establish the City's Police Officer range minimum.

The range minimum for the Police Corporal position will be 7.5% higher than the Police Officer. The Police Corporal is a functional shift lead of Police Officers and reflects the City's progression of sworn police duties. In LCG's experience, lead worker jobs are typically paid between 5% and 10% higher than the jobs led, so the progression from Police Officer to Police Corporal is consistent with market practice.

Further, the City will utilize the ***60th percentile*** of the market's ***pay range minimums*** to establish the City's Police Sergeant range minimum. This allows for an appropriate differential between the Police Officer and the supervising Police Sergeant position. A minimum 15% differential is commonly used between individual contributor positions and supervisory positions to avoid compression.

The City will utilize the ***50th percentile*** of the market's ***pay range minimum*** to establish the City's Police Lieutenant/Deputy Police Chief range minimum. This maintains the minimum suggested differential between subordinate and supervisory jobs. The Police Chief job is found in the General Plan.

For Fire Jobs: Insufficient data was available to compare the City's benchmarks to all Fire benchmarks. In the previous study, the City established competitive pay ranges for Fire positions at ***5% below*** the market of corresponding ***Police range minimums***. However, this strategy produced pay ranges that were not in alignment.

The market summary data is found in **Appendix A**. The data shown for each benchmark job in the market summary:

- excludes the City's data;
- includes data collected from all 16 surveyed organizations;
- has **not** been geographically adjusted to the City's location; and
- is effective as of January 15, 2024.

Benchmark jobs where fewer than 5 organizations reported matches were excluded from any analyses because fewer than 5 matches to a given benchmark are considered an insufficient sample size for drawing conclusions. These benchmarks and other statistics with data from fewer than 5 organizations are noted on each chart as "N/A". As indicated above, please note that insufficient data was collected for all Fire jobs.

The market difference for each benchmark job and for all jobs is calculated using the following formula and is represented as a percentage (%):

$$\frac{\text{(City salary – Market salary)}}{\text{City salary}}$$

Therefore, a positive figure means that the City pays above the market, and a negative figure means that the City pays below the market. This calculation indicates the amount the City would need to adjust salary to align with the market. The overall market difference is not an average of all benchmark jobs' market differences but is calculated as follows and presented as a percentage (%):

$$\frac{\text{(Sum of all City salaries – Sum of all Market salaries)}}{\text{Sum of all City salaries}}$$

(Note: Salary data must be available for both the City and the market for a specific job's data to be included in this calculation.)

The benchmark jobs are separated into three (3) specific job categories:

1) General: All non-sworn jobs and sworn executive police and fire jobs
2) Sworn Police: All non-executive sworn police jobs
3) Sworn Fire: All non-executive sworn fire jobs

The following demonstrates accepted compensation practice guidelines for determining market alignment of individual jobs and pay structures with regard to the City's stated pay strategy and pay target.

Market Alignment Intervals

Interval	Market Alignment
+/- 0% to 4.9%	Highly Aligned
+/- 5.0% to 9.9%	Aligned
+/- 10.0% to 14.9%	Misaligned
+/- >15.0%	Significantly Misaligned

The following tables show the aggregate comparison of the City's actual pay and salary ranges against the market. The pay target for each pay structure is highlighted in each table.

Overall Market Alignment at 50th Percentile – General

Pay	Market Difference	Market Alignment
Actual Salaries	-1.3%	Highly Aligned
City Midpoint to Market Actual Salaries	-9.9%	Aligned
Minimum	-15.2%	Significantly Misaligned
Midpoint	-12.3%	Misaligned
Maximum	-10.5%	Misaligned

Overall Market Alignment – Police

Pay	Market Difference	Market Alignment
Actual Salaries	-19.5%	Significantly Misaligned
Minimum	-19.7%	Significantly Misaligned
Midpoint	-19.1%	Significantly Misaligned
Maximum	-22.6%	Significantly Misaligned

Overall Market Alignment – Fire

Pay	Market Difference	Market Alignment
Actual Salaries	N/A	N/A
Minimum	N/A	N/A
Midpoint	N/A	N/A
Maximum	N/A	N/A

General Pay Structure

Based on the market alignment interval guidelines, the City's current General salary ranges are aligned with the market; however, they lag the market by 9.9%. The City's General pay structures are not competitive with the comparator market and are considered misaligned to significantly misaligned. Despite the misalignment of the salary ranges for the General group, from an aggregate perspective, the actual salaries being paid by the City, while slightly lagging, are considered competitive with the market. While these conclusions describe the

aggregate differences, individual job differences will vary, with some jobs being further above or below the market than the aggregate results.

Police Pay Structure

Overall, for all pay comparisons, the City is considered significantly misaligned with the market. This structure includes the Police Officer, Corporal, Sergeant, and Major jobs. The Police Chief is included in the General structure.

Fire Pay Structure

There was insufficient data from which to draw conclusions for the Fire Pay Structure because most of the City's stated labor market organizations did not have fire operations or utilized volunteer departments.

OUTCOMES & DELIVERABLES

Salary Structure Development

Utilizing the market data obtained from the salary survey, Logic Compensation Group integrated a review of internal equity with the survey data to update the City's three pay structures. Discussions with the City Study Team and LCG consultants addressed the placement of the City's current and new jobs within the proposed pay structures.

Some City job titles and functions have been updated in this pay structure to reflect changes in the City's operations and specific jobs. Job title updates were made at the direction of the City's Study Team, and these title changes will coincide with the implementation of this study.

The resulting pay structures are shown beginning on the next page and are based on the City's pay strategy for each group, internal equity considerations and external market data for each specific group of jobs. Some pay grades do not have job titles assigned; however, the structures allow for future jobs to be assigned to these pay grades based on growth and change in the City.

Proposed General Classifications

The General Pay Structure was updated by 9.9%, and job placement updates and additions were made to the proposed structure.

Job Title	Grade
Seasonal/Temp Positions	1a-d, 2, 3, 4
Maintenance Worker I	6
Administrative Assistant	7
Code Enforcement Officer	7
Police Civilian Clerk	7
Maintenance Worker II	7
Utility Billing Coordinator	8
Utilities Operator I	7
Utilities Operator II	9
Deputy City Clerk/Court Clerk	13
Maintenance Worker III	9
Building Inspector	11
Street Foreman	12
Utilities Superintendent	15
Public Works Director	17
Fire Chief	17
Police Chief	17
Assistant City Manager	19
City Manager	Unclassified
Administrative Coordinator	9

Proposed General Pay Structure

Grade	Minimum	Midpoint	Maximum	Min Rate	Mid Rate	Max Rate	Range Width
1a				$ 7.25	$ 8.70	$ 10.15	40%
1b				$ 8.70	$ 10.44	$ 12.18	40%
1c				$ 10.44	$ 12.53	$ 14.62	40%
1d				$ 12.53	$ 15.03	$ 17.54	40%
2	$ 28,826	$ 36,032	$ 43,238	$ 13.86	$ 17.32	$ 20.79	50%
3	$ 30,988	$ 38,734	$ 46,481	$ 14.90	$ 18.62	$ 22.35	50%
4	$ 33,311	$ 41,639	$ 49,967	$ 16.01	$ 20.02	$ 24.02	50%
5	$ 35,809	$ 44,761	$ 53,713	$ 17.22	$ 21.52	$ 25.82	50%
6	$ 38,495	$ 48,119	$ 57,743	$ 18.51	$ 23.13	$ 27.76	50%
7	$ 41,382	$ 51,728	$ 62,074	$ 19.90	$ 24.87	$ 29.84	50%
8	$ 44,485	$ 55,607	$ 66,729	$ 21.39	$ 26.73	$ 32.08	50%
9	$ 47,822	$ 59,778	$ 71,733	$ 22.99	$ 28.74	$ 34.49	50%
10	$ 51,409	$ 64,261	$ 77,113	$ 24.72	$ 30.89	$ 37.07	50%
11	$ 56,036	$ 70,045	$ 84,054	$ 26.94	$ 33.68	$ 40.41	50%
12	$ 61,079	$ 76,349	$ 91,618	$ 29.36	$ 36.71	$ 44.05	50%
13	$ 66,576	$ 83,220	$ 99,863	$ 32.01	$ 40.01	$ 48.01	50%
14	$ 72,569	$ 90,710	$ 108,852	$ 34.89	$ 43.61	$ 52.33	50%
15	$ 79,099	$ 98,874	$ 118,648	$ 38.03	$ 47.54	$ 57.04	50%
16	$ 86,218	$ 107,772	$ 129,327	$ 41.45	$ 51.81	$ 62.18	50%
17	$ 93,978	$ 117,472	$ 140,967	$ 45.18	$ 56.48	$ 67.77	50%
18	$ 102,436	$ 128,044	$ 153,653	$ 49.25	$ 61.56	$ 73.87	50%
19	$ 111,655	$ 139,569	$ 167,482	$ 53.68	$ 67.10	$ 80.52	50%
20	$ 121,703	$ 152,129	$ 182,555	$ 58.51	$ 73.14	$ 87.77	50%

Proposed Police Pay Structure

The Police Pay Structure was increased by 19.5% at the Police Officer and Police Corporal levels. The Police Sergeant and Major were adjusted based on an appropriate differential between levels. The Police Major is now an exempt job per the City.

Grade	Minimum	Midpoint	Maximum	Min Rate	Mid Rate	Max Rate	Range Width	Job Title
P1*	$ 55,640	$ 68,159	$ 80,678	$ 25.48	$ 31.21	$ 36.94	**45%**	Police Officer
P2*	$ 59,813	$ 73,271	$ 86,730	$ 27.39	$ 33.55	$ 39.71	**45%**	Police Corporal
P3*	$ 68,785	$ 84,262	$ 99,738	$ 31.50	$ 38.58	$ 45.67	**45%**	Police Sergeant
P4	$ 82,542	$ 101,114	$ 119,686	$ 39.68	$ 48.61	$ 57.54	**45%**	Police Major (EX)

*Annual compensation amounts are based on 2,184 standard hours worked per year

Proposed Fire Pay Structure

The Fire Pay Structure was increased by 9.9%, the same as the General structure. The Fire Lieutenant was placed within its own pay range. The Fire Deputy Chief/Codes Officer is now an exempt job per the City.

Grade	Minimum	Midpoint	Maximum	Min Rate	Mid Rate	Max Rate	Range Width	Job Title
F1**	$ 45,507	$ 55,746	$ 65,985	$ 16.51	$ 20.23	$ 23.94	**45%**	Firefighter
F2**	$ 48,920	$ 59,927	$ 70,934	$ 17.75	$ 21.74	$ 25.74	**45%**	Firefighter Lieutenant
F3**	$ 59,511	$ 72,900	$ 86,290	$ 21.59	$ 26.45	$ 31.31	**45%**	Fire Captain
F4	$ 74,279	$ 90,992	$ 107,704	$ 35.71	$ 43.75	$ 51.78	**45%**	Fire Deputy Chief/Codes Officer (EX)

**Annual compensation amounts are based on 2,756 standard hours worked per year

Implementation Costs

The City elected to calculate implementation costs internally for the proposed pay range structures.

PHASE 3: STUDY RECOMMENDATIONS AND REPORTS

In Phase 3, Logic Compensation Group prepared a draft report for the City's review. Following the City's feedback on the report, adjustments were incorporated to supplement and provide additional clarifications, and a final report was delivered.

Upon the City's Study Team's approval of the report, all files were delivered to the City under separate cover.

PHASE 4: PROGRAM MAINTENANCE AND CLIENT SUPPORT

After all approvals, four one-hour follow-up meetings with the City's original Study Team member, the City Manager, and Assistant City Team Members were scheduled for 3 months, 6 months, 9 months, and 12 months following the City's implementation schedule. The purpose of these meetings is to assist the City with any questions it may have or address any unforeseen issues following the study's implementation.

									MARKET DATA COMPARISON AT 50TH PERCENTILE										
		MARKET DATA			CITY OF ORGANIZATION'S DATA				ACTUAL SALARY		RANGE MINIMUMS		RANGE MIDPOINTS		RANGE MAXIMUMS		RANK MIDPT TO MIDPT	CITY MIDPT VS MKT 50TH SALARY	RANGE SPREADS	
Bench ID	Benchmark (City Title)	# Orgs	FLSA (NE vs. EX)	# Inc	Avg Salary	Range Min	Range MidPt	Range Max	Market 50th Salary	Market Diff City vs Mkt	Market 50th Range Min	Market Diff City vs Mkt	Market 50th Range MidPt	Market Diff City vs Mkt	Market 50th Range Max	Market Diff City vs Mkt			City	Mkt Avg
GENERAL																				
1	Administrative Assistant	12	100% vs. 0%	25	$47,632	$32,584	$40,729	$48,875	$51,695	-8.5%	$41,566	-27.6%	$50,449	-23.9%	$59,552	-21.8%	11/13	-26.9%	50.0%	43.3%
2	Utility Billing Coordinator	10	100% vs. 0%	12	$52,541	$35,027	$43,784	$52,541	$44,220	15.8%	$40,749	-16.3%	$48,886	-11.7%	$57,701	-9.8%	8/11	-1.0%	50.0%	41.6%
3	Assistant City Manager	11	9% vs. 91%	11	$121,974	$93,208	$116,510	$139,812	$128,479	-5.3%	$96,071	-3.1%	$117,851	-1.2%	$140,966	-0.8%	6/11	-10.3%	50.0%	46.7%
7	Police Clerk	14	100% vs. 0%	22	$52,541	$35,027	$43,784	$52,541	$48,644	7.4%	$40,025	-14.3%	$49,018	-12.0%	$58,384	-11.1%	10/14	-11.1%	50.0%	45.9%
11	Police Chief	12	0% vs. 100%	12	$106,387	$85,512	$106,890	$128,268	$121,718	-14.4%	$105,538	-23.4%	$128,373	-20.1%	$149,382	-16.5%	9/12	-13.9%	50.0%	41.5%
12	Maintenance Worker II	15	100% vs. 0%	61	$45,552	$32,584	$40,729	$48,875	$44,734	1.8%	$42,145	-29.3%	$50,449	-23.9%	$59,395	-21.5%	14/15	-9.8%	50.0%	40.9%
13	Maintenance Worker III	12	100% vs. 0%	30	$58,345	$40,478	$50,598	$60,718	$55,253	5.3%	$44,972	-11.1%	$56,696	-12.1%	$67,574	-11.3%	11/12	-9.2%	50.0%	50.3%
14	Utilities Operator I	9	100% vs. 0%	21	$46,967	$37,654	$47,068	$56,482	$43,896	6.5%	$40,749	-8.2%	$48,886	-3.9%	$57,064	-1.0%	6/9	6.7%	50.0%	40.0%
15	Utilities Operator II	7	100% vs. 0%	13	N/A	N/A	N/A	N/A	$56,551	N/A	$45,613	N/A	$55,213	N/A	$64,813	N/A	N/A/6	N/A	N/A	42.1%
	AGGREGATE COMPARISON									-1.3%		-15.2%		-12.3%		-10.5%		-9.9%	50.0%	43.6%
SWORN FIRE																				
4	Firefighter	3	100% vs. 0%	14	$43,757	$41,408	$50,724	$60,041	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2/4	N/A	45.0%	N/A
5	Fire Lieutenant	1	100% vs. 0%	2	$50,614	$41,408	$50,724	$60,041	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2/2	N/A	45.0%	N/A
6	Fire Captain	3	67% vs. 33%	5	$70,278	$54,150	$66,333	$78,517	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	2/3	N/A	45.0%	N/A
	AGGREGATE COMPARISON									N/A		N/A		N/A		N/A		N/A	45.0%	N/A

									MARKET DATA COMPARISON AT 75TH (OFFICER & CORPORAL) & 60TH (SERGEANT) PERCENTILE										
		MARKET DATA			CITY OF ORGANIZATION'S DATA				ACTUAL SALARY		RANGE MINIMUMS		RANGE MIDPOINTS		RANGE MAXIMUMS		RANK MIDPT TO MIDPT	CITY MIDPT VS MKT %TILE MIN	RANGE SPREADS	
Bench ID	Benchmark (City Title)	# Orgs	FLSA (NE vs. EX)	# Inc	Avg Salary	Range Min	Range MidPt	Range Max	Market %tile Salary	Market Diff City vs Mkt	Market %tile Range Min	Market Diff City vs Mkt	Market %tile Range MidPt	Market Diff City vs Mkt	Market %tile Range Max	Market Diff City vs Mkt			City	Mkt Avg
SWORN POLICE																				
8	Police Officer	14	100% vs. 0%	171	$50,765	$46,561	$57,037	$67,513	$60,590	-19.4%	$53,551	-15.0%	$67,086	-17.6%	$85,652	-26.9%	12/14	-15.0%	45.0%	59.9%
9	Police Corporal	3	100% vs. 0%	19	$56,850	$50,053	$61,315	$72,577	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	4/4	N/A	45.0%	N/A
10	Police Sergeant	14	100% vs. 0%	51	$64,931	$58,105	$71,178	$84,252	$77,724	-19.7%	$71,734	-23.5%	$85,593	-20.3%	$100,418	-19.2%	11/14	-23.5%	45.0%	40.0%
	AGGREGATE COMPARISON									-19.5%		-19.7%		-19.1%		-22.6%		-19.7%	45.0%	50.0%

Technical Proposal

NOVEMBER 20, 2025

RFP

Classification and Compensation Study

City of Independence, Iowa

Submitted by:

RACHEL SKAGGS, MPA
DIRECTOR, HUMAN CAPITAL SOLUTIONS
790 FRONTAGE ROAD, SUITE 213
NORTHFIELD, IL 60093
815.303.2187
RSKAGGS@MGT.US

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	MGT Impact Solutions, LLC
Mailing Address:	4320 West Kennedy Boulevard, Ste 200, Tampa, Florida 33609
Website:	www.mgt.us
Year Firm Established:	1974
Office Location Performing the Work:	MGT utilizes experienced telecommunting staff who are supported by our corporate office in Tampa, Florida.
Primary Contact Person:	Rachel Skaggs
Title:	Director
Phone:	888.302.0899
Email:	proposals@mgt.us

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [✓] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [✓] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

the exterior with: **"SEALED COST PROPOSAL – SALARY STUDY"**.

Technical Proposal Contents:

- [ ] **Part A: Transmittal Letter:** A signed cover letter introducing your firm and affirming the proposal's validity for at least 90 days.
- [ ] **Part B: Firm Experience and Qualifications:**
  - [ ] Firm history, size, and ownership structure.
  - [ ] Detailed experience with public sector classification and compensation studies.
  - [ ] A list of at least five (5) similar projects for municipal clients within the last three (3) years.
  - [ ] Complete resumes for the proposed Project Manager and all key personnel assigned to the project.
- [ ] **Part C: Project Approach and Work Plan:**
  - [ ] A detailed narrative describing your firm's understanding of the project and proposed methodology for each task in the Scope of Services.
  - [ ] A detailed project work plan with a clear timeline, tasks, and milestones.
  - [ ] A sample of a final report from a previous, similar municipal project.
  - [ ] A sample of a job description from a previous, similar municipal project.
- [ ] **Part D: References:**
  - [ ] At least three (3) references from public sector clients (use Section 3 of this form).
- [ ] **Part F: Acknowledgement Form (Section 4 of this form):** Signed and included in the proposal.

Sealed Cost Proposal Contents:

- [ ] All-inclusive, "not-to-exceed" total project cost.
- [ ] Detailed cost breakdown by task/phase, including professional fees, estimated hours, and billing rates for each team member.
- [ ] Schedule of hourly rates for any additional work requested outside the original Scope of Services.

Section 3: Client References

Provide at least three (3) references from public sector clients for whom similar work was completed within the last five years.

Reference 1:

Client Name:	CITY OF DYERSVILLE, IOWA
Contact Person & Title:	Mick J. Michel, City Administrator
Phone:	563-875-7724
Email:	mmichel@cityofdyersville.com
Brief Description of Project:	CLASSIFICATION AND COMPENSATION STUDY

Reference 2:

Client Name:	CITY OF INDIANOLA, IOWA
Contact Person & Title:	Courtney Silliman, HR Director
Phone:	515-961-9410
Email:	csilliman@indianolaiowa.gov
Brief Description of Project:	CLASSIFICATION AND COMPENSATION STUDY

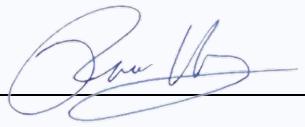
Reference 3:

Client Name:	CITY OF MARSHALLTOWN, IOWA
Contact Person & Title:	Jill Petermeier Human Resources Director
Phone:	641-754-5704
Email:	jpetermeier@marshalltown-ia.gov
Brief Description of Project:	CLASSIFICATION AND COMPENSATION STUDY

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY. List Addenda Numbers received:
   None
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	
Printed Name:	Robert Holloway
Title:	Senior Vice President
Date:	11/7/2025

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Part A: Transmittal Letter

November 20, 2025

Matthew R. Schmitz, City Manager
City of Independence
331 1st Street E,
Independence, IA 50644

RE: RESPONSE TO RFP CLASSIFICATION AND COMPENSATION STUDY

Dear Mr. Schmitz:

MGT Impact Solutions, LLC (MGT) is pleased to respond to your request for proposal (RFP) for a Classification and Compensation Study for the City of Independence ("City"). Our response provides our firm's qualifications, our team's experience, and a detailed work plan and timeline. We understand Human Resources (HR) management is a vital part of an organization's operations, especially as the demand, cost, and complexity of public services continue to increase and resources are constrained, presenting challenges in planning, organizing, and directing HR functions to achieve maximum efficiency and effectiveness. A properly developed, administered, and maintained classification and compensation plan forms the foundation for meeting these challenges, ensuring the successful recruitment and retention of highly skilled employees, even in a competitive marketplace.

MGT brings extensive experience conducting comprehensive classification and compensation studies for **Iowa municipalities, including Burlington, Dyersville, Indianola, and Marshalltown.** Our work has established equitable, market-competitive, and legally compliant pay structures while updating job descriptions to reflect current duties, supporting recruitment, retention, and long-term workforce sustainability.

Our certified staff are HR experts, providing public sector organizations with high quality services. We know our proven methodologies will provide the City with the data-driven and sustainable improvements desired. Our combined hands-on experience and credentials have made MGT a proven leader in public sector consulting for over 50 years.

MGT CONTACT INFORMATION

MGT HEADQUARTERS	**MGT Impact Solutions, LLC** 4320 West Kennedy Boulevard | Tampa, Florida 33609 P: 813.327.4717 | www.mgt.us | FEIN: 81-0890071
PROPOSAL CONTACTS	**Rachel Skaggs, MPA** **Director – Human Capital Solutions** P: 815.303.2187 | E: rskaggs@mgt.us

Thank you for the opportunity and your consideration. Should you have questions on any aspect of this proposal, please contact our **Human Capital Director, Rachel Skaggs.**

Regards,

Patrick J. Dyer, Vice President. *Authorized to bind the firm.*

Part B: Firm Experience & Qualifications

Firm Profile

*Impacting communities **for good**.*

MGT brings ***50 years*** of experience driving positive social change and performance in education, government, nonprofits, and critical infrastructure/private industries through ***assisting clients to strengthen their foundation, change systematically, and enable resiliencies for long-lasting change.*** Since inception, MGT has significantly grown in size and capacity – working with state and local governments and education partners. Today, we bring a team of over **1,200 professionals** who offer in-depth market knowledge and understanding so we can hit the ground running.

MGT is a privately held, employee-owned and financially stable limited liability company with a deep roster of staff and a commitment to serving the public. Our clients care about addressing the world's most-pressing problems, and so do we. Their "why" is our why.

What sets us apart is our ability to customize and offer individualized support but also the resources of a larger infrastructure to enable flexibility in impacting to-scale. Throughout our history, MGT has successfully delivered more than **30,000 projects** through a thoughtful balance of balancing the "immediate" needs while changing systems to plan for future resilience and success.

MGT | FIRST LOOK

Name: MGT Impact Solutions, LLC (MGT)

Locations: Headquarters in Tampa, FL; branch offices nationwide.

Cooperative Contracts:
ASC 20-7359, 24-7484
OMNIA LS4612
TIPS 220601, 220802, 230105
TXShare 2024-019

Structure: Privately held, employee-owned, client-driven Limited Liability Company.

Lines of Business: Strategy and Implementation, Performance and Operations, IT Infrastructure, and Cyber Security and Resilience for public sector and commercial companies.

Markets we serve:

- Higher Education
- Prek-12
- Government
- Nonprofits
- Commercial Industries

50 years

1,200 consultants

30,000 projects

Specialized technology and advisory solutions for society's most mission-critical challenges.

M Magister Expertise
G Gratia Service
T Talentum Talent

Our Commitment

MGT embraces the most complex challenges on the leadership agenda, with deep commitment, agility, and local expertise to make a measurable and profound impact. Simply stated, **we are impacting communities for good.**

DEFINED BY **IMPACT**

Making a profound impact on society is at the heart of who we are and what we do. This study will support a diverse, motivated, and skilled workforce, enhancing the City of Independence's capacity to deliver high-quality public services to your community.

People

We believe in the power of connecting people and ideas to solve mission-critical, complex challenges to foster trusted partnerships with clients, for life.

Purpose

We are led by a singular purpose—to offer partnerships and design solutions that provide enduring opportunities for individual prosperity and community well-being.

Performance

We partner with our clients to advance learning outcomes, manage technology networks, reduce operational costs, improve workflows, and engineer resilient IT infrastructure.

Beyond the Project:

Education
State & Local Government
Enterprise & Critical Industries

Technology Solutions

We provide engineering expertise to modernize and manage IT infrastructure and ensure technology implementation is properly designed, integrated, optimized, and maintained. MGT delivers end-to-end solutions tailored to your unique needs, spanning managed services, cybersecurity, physical security, network infrastructure, cloud and data, SaaS offerings, and communications.

As your trusted advisors, we partner with you to develop strategic technology architectures and/or assist you in quickly procuring and installing equipment for immediate needs or to resolve an IT issue.

Advisory Solutions

We empower organizations to make data-informed decisions by unlocking and organizing critical information—financial and operational—to support strategic, evidence-based planning.

With that insight, we partner with clients to develop tailored strategies and actionable road maps that drive meaningful outcomes.

Our expertise spans data, talent, processes, and technology—optimizing each to achieve measurable impact with efficiency. From PMO support to workforce placement and development, we work alongside our clients to implement solutions and deliver results that matter.

Comprehensive People Solutions

We support clients in addressing their most mission-critical human capital needs, with specialized expertise in executive recruitment, staffing solutions, and human resources consulting. With over 1,250 clients, 3,100 completed projects, and a 93% client satisfaction rate, MGT delivers tailored solutions to help organizations attract top talent, meet urgent short- or long-term staffing demands, support critical IT project staffing needs, and strengthen their workforce strategies.

To schedule a complimentary consultation, contact:

Senior Vice President Joellen Cademartori, MGT's head of Human Capital, at jcademartori@mgt.us.

Relevant Experience

Proven Public Sector Consulting Expertise.

MGT offers extensive expertise in guiding public sector organizations through modern, complex workforce challenges. We prioritize real-world issues such as retaining high-performing staff, responding to market dynamics, aligning pay with responsibilities, and promoting internal equity. We collaborate closely with clients, customizing our approach to fit their unique structure, workforce, and objectives. Utilizing proven tools and frameworks, we ensure rigorous analysis, credible outcomes, actionable recommendations, and support to ensure success.

Appendix A lists sample clients by state for whom MGT has completed classification, compensation, and other human capital projects.

Case Studies

CITY OF BURLINGTON, IOWA - CLASSIFICATION AND COMPENSATION STUDY

The City of Burlington in 2015 retained MGT to conduct a comprehensive classification and compensation study to evaluate the accuracy and equity of the City's existing pay structure. The study aimed to ensure that employees received equal pay for equal work and that the City's compensation system was both fair internally and competitive externally. The analysis focused on understanding the duties, responsibilities, qualifications, and physical demands of each position through the completion of a Job Analysis Questionnaire (JAQ), which served as the foundation for an updated and equitable classification plan.

CITY OF DYERSVILLE, IOWA - CLASSIFICATION AND COMPENSATION STUDY & JOB DESCRIPTIONS

MGT completed a comprehensive Classification and Compensation Study for the City of Dyersville in 2020, with an update conducted in 2023. The project included a review of benefits and covered approximately 19 positions across the organization. The study evaluated internal equity and external competitiveness to ensure fair and consistent compensation practices. The resulting plan established a clear and sustainable classification structure, promoted fair and competitive pay, aligned with state and federal requirements, and supported employee retention. As part of the engagement, MGT also updated job descriptions to reflect current responsibilities and qualifications.

CITY OF INDIANOLA, IOWA - CLASSIFICATION AND COMPENSATION STUDY & BENEFITS REVIEW

MGT completed a comprehensive Classification and Compensation Study for the City of Indianola in 2022, which included a review of benefits for approximately 150 employees across 45 positions. The study evaluated the City's overall compensation and pay structure to ensure both internal equity and external market competitiveness. Each position underwent a detailed job audit to confirm appropriate classification. The resulting system provided the City with a fair, competitive, and sustainable compensation structure designed to support the recruitment and retention of qualified employees while maintaining ease of administration and long-term consistency.

WELLNESS CAMPUS, CITY OF INDIANOLA, IOWA - CLASSIFICATION PLAN

MGT assisted the City of Indianola, in 2023, in integrating 20 new positions from the recently acquired YMCA Indianola branch into the City's existing classification plan for the Indianola

Wellness Campus. MGT managed the project by conducting virtual meetings with the new employees to explain the purpose of the study and distribute Job Analysis Questionnaires (JAQs). After collecting the JAQs, the project team interviewed employees, analyzed the data, assigned appropriate skill levels, and incorporated the positions into the City's established compensation plan, ensuring alignment with the existing classification and compensation structure.

CITY OF MARSHALLTOWN, IOWA - CLASSIFICATION AND COMPENSATION STUDY

In 2023, MGT conducted a review of the City of Marshalltown's classification and compensation plan, covering approximately 98 employees in 63 non-union positions. The study aimed to establish a clearly defined compensation system that supported efficient and effective classification processes, provided fair and competitive wages, complied with state and federal regulations, aligned with best practices, and promoted the recruitment and retention of qualified employees. The project also included an evaluation and update of existing job descriptions to reflect current duties and responsibilities.

What sets us apart:

- **MGT has conducted classification and compensation studies nationwide for public sector organizations for over 50 years.** Our clients include cities, counties, special districts, school districts, higher education institutions, tribal entities, and non-profit agencies. Many clients are repeat clients, reflecting the quality of our services, the practicality of our recommendations, and the strength of the relationships we build.
- **Experienced and credentialed team.** MGT is comprised of industry experts with hands-on public sector experience from their past roles. Our consultants also hold Society for Human Resource Management – Certified Professional (SHRM-CP) and SHRM – Senior Certified Professional (SCP) certifications, as well as Project Management Professional (PMP) and Certified Change Management Professional (CCMP) credentials in project and change management. We bring both discipline and flexibility to ensure every project is professionally managed and locally relevant.
- **Broad expertise in human capital consulting.** MGT routinely conducts classification and compensation studies, HR audits, policy reviews, staffing and organizational assessments, and performance system updates. This allows us to understand the broader human capital landscape and bring value-added insights to every project.
- **Balanced use of data sources.** We combine peer benchmarking with reliable market data to provide complete and accurate comparisons, ensuring that our recommendations are both realistic and forward-thinking.
- **Tailored, data-driven recommendations.** MGT develops tailored recommendations that reflect each client's unique organizational structure and goals. Our work is designed to be easily understood, practical, flexible, and sustainable.
- **Continued support.** We provide implementation guidance and support to ensure a successful rollout and effective ongoing maintenance to ensure a sustainable and equitable system over the long term.

We're proud to bring our team's expertise to this project, helping you with the right people and processes to deliver quality services. Our strong client retention reflects our commitment to long-term public sector partnerships.

Key Personnel

The success of a consulting engagement is based on the project team's qualifications and the way the review is managed.

The proposed team structure for this project has been designed to define the roles and responsibilities of team members assigned to this project and to facilitate efficient and effective project management. **The Project Manager and Team Members will be assigned at the time of contract commencement and will be determined depending on workload and commitments at that time.** Each team member has a wide range of project experience working with clients similar to the City of Independence, and our team is highly experienced with this type of engagement – requiring little orientation time.

MGT cross-trains staff to ensure appropriate coverage for our projects. Should any member of the team take leave or resign during the engagement, MGT is prepared to reorient and assign a comparable staff member with similar expertise and skill to cover the member's duties. This guarantees project continuity and ensures your deliverables remain on schedule.

Project Staff Roles and Responsibilities

ROLE ASSIGNED	RESPONSIBILITIES
THE CITY'S PROJECT OFFICER	We look forward to working with the City's Project Officer to build a long-lasting partnership that produces innovative solutions.
DIRECTOR *Rachel Skaggs*	The Director holds the following responsibilities: ▪ Oversees contractual process at the start of the project. ▪ Ensures the team fulfills all contractual requirements. ▪ Resolves any conflicts or point of escalation for any challenges. ▪ Practice and Project Team management.
PROJECT MANAGER *Sheena Horton* *Katy Yee* *Rachel King*	The Project Manager holds the following responsibilities: ▪ Main point of contact for the City. ▪ Day-to-day management of the project, tasks, and deliverables. ▪ Oversight over service and deliverable quality. ▪ Management of all project deadlines. ▪ Maintains frequent contact with the City's Project Officer throughout the lifecycle of the project.
CONSULTANT TEAM* *Alice Bieszczat* *Julie Hawkins* *Rick Labib-Wood* *Joel Palladini*	The Consultant Team has the following responsibilities: ▪ Works closely with the City under the direction of the Project Manager to carry out tasks and deliverables. ▪ Utilizes subject matter expertise to customize and execute each task and fulfill the City's stated expectations. ▪ Conducts data collection and analysis. ▪ Reviews, documents, evaluates, and generates recommendations in accordance with each component of the work plan.

**Additional subject matter experts may be engaged at the Project Manager's discretion to support specific aspects of the study, such as employee interviews.*

Project Team Biographies

Biographies of our proposed project personnel are provided on the following pages.

Rachel Skaggs, M.P.A.

Director

Rachel Skaggs is a seasoned Director with over a decade of experience in local government management. Specializing in budget management, economic development initiatives, human resources, and community engagement, Rachel has successfully led more than 150 projects across diverse communities nationwide. Her comprehensive approach ensures that classification and compensation plans promote both internal and external equity, achieving long-term administrative efficiency. Rachel's expertise is backed by her significant contributions to Illinois municipalities, including the Village of Montgomery, Village of Schaumburg, and the City of Princeton, where she demonstrated fiscal responsibility and strategic leadership in her management roles.

In her previous role as City Manager, Rachel managed HR tasks, budgeting, economic development, and community outreach efforts, consistently fostering vibrant and engaged communities. She is passionate about advancing diversity and inclusivity in municipal decision-making processes, having co-authored articles on women in government leadership and implemented initiatives to enhance citizen involvement. Rachel's commitment to collaboration and trust-building is reflected in her active memberships in professional organizations, contributing to her reputation as a trusted leader in local government management.

Areas of Expertise

- Local Government Management
- Capital and General Budgets
- Economic Development
- Pay Equity
- Strategic Planning
- Human Resources
- FLSA Requirements
- Debt Refinancing
- Contract Negotiation
- Community Engagement

Education

- M.P.A., Northern Illinois University
- B.A., English and Political Science, Northern Illinois University

Professional Development & Speaking Engagements

- Presentation on Females in Local Government:
  - ICMA Conference, Phoenix, Arizona, 2012
  - The Legacy Project
  - ILCMA
- Public Management Magazine article “Women Leading Government,” co-authored with Heidi Voorhees
- Public Voices XIII No. 2 article “Advancing Women in Local Government: The Case in Illinois”, co-authored with Dr. Kimberly Nelson

Memberships & Affiliations

International City and County Management Association

Illinois City/County Management Association

Illinois Public Employer Labor Relations Association

Princeton Rotary Club

The Legacy Project

Professional Experience

MGT Impact Solutions, LLC, Director, 2019-Present

City of Princeton, IL, City Manager, 2015-2019

Village of Schaumburg, IL, Management Analyst, 2012-2015

Village of Montgomery, IL, Management Analyst; HR Manager, 2009-2012

Sheena Horton
SHRM-SCP, PMP, CCMP, CSSYB
Project Director, Human Capital Consulting
Based in Raleigh, NC

Sheena Horton is a certified SHRM-SCP, Project Management Professional (PMP), Six Sigma Lean Yellow Belt, and Prosci Change Management Practitioner (CCMP) with over 18 years of expertise in evaluation and over 15 years in management consulting. She specializes in human capital projects, focusing on classification and compensation studies, program/performance evaluations, benefits reviews, staffing studies, organizational reviews, needs assessments, and strategic planning. Sheena's comprehensive skill set includes empowerment evaluation, quality assurance, efficiency reviews, continuous improvement initiatives, transformation, and business process analyses. Her multifaceted experience extends to supporting student housing studies, facilities assessments, student literacy and safety program evaluations, and community engagement initiatives.

Sheena's academic background includes a Master's degree in Criminology and Criminal Justice and dual Bachelor's degrees in Sociology and English. She also holds a certification in Diversity, Equity, and Inclusion in the Workplace from the University of South Florida. Her notable contributions to human capital and organizational solutions have earned her prestigious awards, including the Seminole 100 Honoree, MGT's Bull by the Horns MVP Award, and MGT's Top Kaizen Project Award.

Areas of Expertise

- Project Management
- Change Management
- Organizational Reviews
- Efficiency and Process Analysis
- Business Transformation
- Strategic Planning
- Stakeholder Engagement
- Human Resources
- Policy and Procedures Development and Evaluation
- Program and Performance Evaluations
- Market Research
- Program and Service Realignments

Education/Credentials

- M.S., Criminology and Criminal Justice, Florida State University
- B.A., Sociology (Criminology concentration) & B.A., English, University of North Carolina-Greensboro
- Project Management Professional (**PMP**), Project Management Institute
- Certified Change Management Practitioner (**CCMP**), Prosci
- Certified Six Sigma Lean Yellow Belt (**CSSYB**)
- Society of Human Resource Management Senior Certified Professional (**SHRM-SCP**)
- Diversity, Equity, and Inclusion in the Workplace certification, University of South Florida

Selected Project Highlights

Los Angeles Unified School District, CA
IT Recruitment, Retention, Classification Alignment, and Compensation Study

Brevard Public Schools, FL
Compensation Study

Centre Area Transportation Authority, PA
Compensation Study

Southern Nevada Regional Housing Authority, NV
Classification, Compensation, and Performance Evaluation Studies

City of Hermiston, OR
Classification and Compensation Study

Harford County Public Schools, MD
Compensation & Benefits Study

City of Stonecrest, GA
Classification and Compensation Study

County of Lapeer, MI
Classification and Compensation Study

Disability Rights Florida
Benefits Study

Work Experience

MGT Impact Solutions, LLC, Project Director, 2010-Present
Healthy Families Florida, Program Coordinator, 2008-2009
Salem Press, Staff Writer, 2007-2008
Measurement, Inc., Reader/Evaluator, 2006
Choicepoint, Criminal Records Specialist, 2004-2005

Katy Yee

Project Manager

Katy Yee brings over 25 years of experience in multiple public sector settings, focusing on human resources and administrative management. Katy's human resources areas of concentration have included organizational development, compensation, recruitment and retention, and training and staff development.

The cornerstone of Katy's career is with DuPage County Government and the DuPage County Health Department. At those organizations, she coordinated and participated in several agency-wide compensation studies utilizing and applying the Korn-Ferry (formally Hay Group) methodology. While working in public health as Director of Organizational Development, Katy was directly responsible for the areas of quality improvement, compliance, and accreditation. In addition, she led agency-wide initiatives focused on integrating services and improving client access to care. Some of these initiatives included: redesigning client intake processes, supporting the implementation of an electronic medical record, and ensuring compliance with ACA requirements.

Most recently, Katy worked with Elgin Community College and the Forest Preserve District of Kane County. These opportunities highlighted Katy's ability to engage in and contribute to organizational effectiveness in a variety of public sector settings. Her broad depth of knowledge, professionalism, and approachable style have enabled her to build relationships at all levels within each organization and provide relevant, practical, and valuable human resources support.

Katy's philosophy on human resources and organizational development has always been that of a "business partner" – she truly enjoys working on solutions that help to support the operational needs of the organization.

Areas of Expertise

- Korn-Ferry methodology
- ACA compliance
- Accreditation
- Services Integration
- Client care access
- Client intake processes
- Medical records protocols
- Classification and Compensation Project Management

Education

- B.A., Urban Studies, Elmhurst College
- Certificate, Marketing Analytics, Udacity

Certifications

- SHRM-CP, Society for Human Resources, Certificate
- Time Management Trainer, Certificate

Memberships & Affiliations

Society for Human Resources (SHRM)

Illinois Park and Recreation Association (IPRA)

Professional Experience

MGT Impact Solutions, LLC, Project Manager, 2022-Present

Forest Preserve District of Kane County, Geneva, IL; Director of Human Resources

Elgin Community College, Elgin, IL; Director of Compensation and Talent Acquisition

DuPage County Health Department, Wheaton, IL; Director of Organizational Development; Human Resources Manager

DuPage County Government; Interim Director of Human Resources, Human Resources Manager; Human Resources Supervisor; Human Resources Generalist and Recruitment Specialist

Rachel King

Project Manager

Rachel King is a Classification and Compensation Project Manager with over eight years of experience in human resource management. She has led more than 30 classification and compensation projects, creating tailored solutions for clients ranging from small municipalities to large entities with populations exceeding 200,000. Her expertise extends to performance evaluations, benefits analysis, and developing DEIB best practices, helping organizations improve both employee engagement and operational effectiveness.

Previously, Rachel was a Human Resources Manager at the technology startup cove.tool, where she handled recruiting and employee relations. Passionate about fostering inclusive workplace cultures, she played a key role in securing the Great Place to Work certification, demonstrating her commitment to creating positive, engaging environments for all employees.

Areas of Expertise

- HRIS & ATS
- Benefits Administration
- Performance Management
- HR Strategy Creation & Execution
- Onboarding & Offboarding
- Training & Leadership Development
- Employee Relations Management
- Policy Development
- Project Management
- Compensation Management
- Employee Retention
- Employee Engagement & Satisfaction

Education

- B.S., HR Management, Southern New Hampshire University

Selected Project Highlights

City of Benson, AZ
Compensation Study

Hawkeye Community College, IA
Classification and Compensation Study

Indianola Municipal Utilities, IA
Classification and Compensation Study

Livingston County, MI
Classification and Compensation Study

Livingston County Community Mental Health, MI
Classification and Compensation Study

Navajo Tribal Utility Authority, AZ
Classification and Compensation Study

Rhode Island Housing, RI
Executive Compensation Survey & Analysis

Tampa Housing Authority, FL
Classification and Compensation Study

Town of Richmond, VT
Benefits Analysis

Village of Elburn, IL
Classification and Compensation Study
Performance Review Tool

Work Experience

MGT Impact Solutions, LLC, Project Manager, 2022-present

cove.tool, HR Manager, May 2021-March 2022

Edward Jones, HR Generalist, June 2019-May 2021; Office Manager/Retirement Specialist, February 2016-June 2019

Alice Bieszczat

Classification and Compensation Specialist

Alice Bieszczat is a seasoned Classification and Compensation Specialist with over 25 years of diverse experience across the private, non-profit, and public sectors. Over the past decade, she has spearheaded or contributed to over 150 Classification and Compensation Studies across 21 states, collaborating with municipalities, counties, park districts, special services agencies, and non-profit organizations. Her expertise spans union, non-union, management, technical, and administrative positions, showcasing her adaptability to various organizational structures and complexities.

In addition to her extensive consulting background with firms like Voorhees Associates and the PAR Group, Alice has provided non-profit consulting services for esteemed institutions such as the Ann & Robert H. Lurie Children's Hospital of Chicago and the Archdiocese of Milwaukee. Her recent projects have involved Classification and Compensation Studies in multiple states, highlighting her broad geographic reach and comprehensive approach to human resources consulting. Prior to her consulting roles, Alice contributed to transportation innovation research published in reputable journals and national media outlets, and led fundraising efforts at Lurie Children's Hospital, demonstrating her multifaceted skill set and dedication to driving positive organizational change.

Areas of Expertise

- Classification and Compensation Studies
- Human Resources Consulting
- Non-Profit Consulting
- Municipalities, Counties, Park Districts, and Special Services Agencies
- Union and Non-Union Environments
- Management, Technical, and Administrative Positions
- Transportation Innovation Research

Education

- M.P.S., DePaul University
- B.S., Mathematics, DePaul University

Professional Development & Speaking Engagements

- Published Research on Transportation Innovations in Transportation Research Journal and Transport Policy
- Lecturer on Transportation Innovations

Professional Consulting

Aurora Healthcare and the Archdiocese of Milwaukee

Ann & Robert H. Lurie Children's Hospital of Chicago

North Shore Senior Center

Logan Square Neighborhood Association

Professional Experience

MGT Impact Solutions, LLC, Classification and Compensation Specialist, 2016-Present

Chaddick Institute of Metropolitan Development DePaul University, 2009-2012

Lurie Children's Hospital of Chicago, 2005-2008

American Diabetes Association, 2004-2005

Accelerated Fundraising Solutions, 2000-2003

Sprint Cellular/Alltel, 1996-2000

Julie Hawkins

Classification & Compensation Specialist

Julie Hawkins is a seasoned Classification and Compensation Specialist with MGT, bringing over 30 years of experience in local government administration and human resources. Julie has successfully worked on more than 30 Classification and Compensation Studies in the past year alone, with numerous additional studies completed over the years. Her expertise encompasses a wide range of HR functions, including personnel policy and job description creation and updates, recruitment, and staffing studies. Julie's collaborative approach has been proven effective with elected and appointed officials across various municipal, park, library, and water agencies.

Julie is dedicated to the public sector, understanding its critical role in daily life. She is an accomplished speaker and trainer, having presented on topics such as hiring and onboarding, performance management, HR compliance in the public sector, I-9 compliance, and ethics programs. Julie has also contributed significantly to professional organizations by serving on boards and organizing events for annual conferences. Her academic credentials include a Master of Arts in Public Administration from Northern Illinois University and a Bachelor of Arts in Public Administration and Political Science from Augustana College.

Areas of Expertise

- Classification and Compensation Studies
- Personnel Policy and Job Description Creation and Updates
- Recruitment and Staffing Studies
- Human Resource Compliance in the Public Sector
- Hiring and Onboarding Processes
- Performance Management
- Training and Development

Education

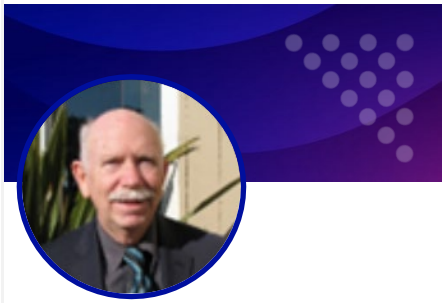
- M.P.A., Northern Illinois University
- B.A., Public Administration & Political Science, Augustana College

Memberships & Affiliations

- International City/County Management Association (ICMA) – Annual Conference Committee
- Illinois City/County Management Association (ILCMA)
- Illinois Association of Municipal Management Assistants (IAMMA) – Past President
- Society for Human Resource Management (SHRM)
- Illinois Public Employer Labor Relations Association (IPELRA)
- Illinois Association of Park Districts (IAPD/IPRA)
- Illinois Library Association (ILA)
- Illinois Government Finance Officers Association (IGFOA)

Professional Experience

- MGT Impact Solutions, LLC, Classification and Compensation Specialist, 2023-Present
- Sikich LLP, Human Resources Consultant, 2009-2017
- CCF Consulting, Public Sector Human Resources Consulting Services, Owner, 1996-2009
- Village of Carol Stream, IL, Assistant to the Village Manager, 1989-1996
- Village of Elk Grove, IL, Village Manager's Office, Administrative Assistant, 1987-1989
- City of Rock Island, IL, Administrative Intern, 1986-1987



Frederick “Rick” Labib-Wood, M.P.H.

Director
Based in San Diego, CA

Frederick “Rick” Labib-Wood has over 45 years of experience in managing human resource programs across various public sector organizations, including over 20 years in California public schools. As the former Classified Personnel Director for the San Dieguito Union High School District, Rick was instrumental in all HR functions for the District’s Personnel Commission. He also contributed to the training and development of school employees in San Diego County through the Classified Employees Development Academy. In Hawaii, he was active in legislative research and policy development, implementing flexible working hours and developing job-sharing programs statewide for Hawaii’s civil service.

Rick has led numerous classification and compensation studies, focusing on change management and organizational restructuring. He holds a Master of Public Health from the University of Hawaii and a Bachelor of Arts in French from Austin College, along with a diploma in French language and civilization from the Sorbonne. Rick shares his expertise as an adjunct faculty member in HR and public administration programs, fostering the professional growth of future HR leaders.

Areas of Expertise

- Project Management
- HR Management and Administration Systems
- Classification and Compensation Studies
- Change Management and Reorganization
- Legislative Research and Policy Development
- Training and Development
- Flexible Working Hours Program Implementation
- Job-sharing Program Development
- Public Sector HR Consulting

Education

- M.P.H., University of Hawaii, Manoa Campus, 1984
- B.A., French, Austin College, 1968
- Diplôme d’Études de civilisation française, Sorbonne, University of Paris, France, 1967

Selected Project Highlights

Cajon Valley Union School District
El Cajon, CA
Classification and Compensation Studies

Alpine Union School District
Alpine, CA
Classification and Compensation Study

Yolo County Office of Education, Woodland, CA
Classification and Compensation Study

Madera Unified School District
Madera, CA
Classification and Compensation Study

Navajo Tribal Utility Authority
Fort Defiance, AZ
Compensation Study

County of Livingston Courts, MI
Classification and Compensation Study

Tampa Bay Water, FL
Compensation Study Update

Work Experience

- MGT Impact Solutions, LLC, Director, 2020-Present; Consultant 2015-2020
- San Dieguito Union High School District, Director of Classified Personnel, 1993-2014
- Riverside County, CA, Personnel Department, Supervising Analyst, 1988-1993
- State of Hawaii, Department of Personnel Services, Classification and Compensation, Administrative Services, 1974-1986
- National University, Adjunct Faculty, 1996-2024
- United States Coast Guard Active Duty and Active Reserve (Ret.), 1970-1976 and 1984-2006

Joel Palladini

Analyst

Based in San Antonio, TX

Joel Palladini is a U.S. Army Veteran and mid/senior-level Analyst with 7+ years of experience in data analysis, project management, and working with dynamic cross-functional teams. He provides oversight and project management for classification and compensation studies and has broad experience conducting analyses on classification and compensation studies, and organizational expertise in managing software and collaboration tools to keep the human capital team on track in completing projects. He also provides the team with excellent technical expertise in various systems and methodologies.

Joel's time in the military established a baseline career as an Analyst. He served as an Intelligence Analyst in the 82nd Airborne Division based out of Fort Bragg, North Carolina. Joel had one deployment to the Middle East in support of Operation Inherent Resolve. In addition to his work on human capital, he assists key leaders with client relations support, processing opportunities, and providing guidance on next steps with future clients.

Joel holds a Bachelor of Science degree from Kent State University in Integrative Studies with concentration in Business Administration, Accounting, and Marketing.

Areas of Expertise

- Project Management
- Data Analysis
- Classification and Compensation Studies
- Intelligence Analysis
- Client Relations

Education

- B.S., Integrative Studies, with a Concentration in Business Administration, Accounting, and Marketing, Kent State University

Recognitions

- 2022 Army Commendation Medal
- National Defense Service Medal
- Global War on Terrorism Service Medal – Expeditionary
- Professional Development Ribbon

Selected Project Highlights

Berkeley Public Schools, CA
Classification and Compensation Study

City of Culver City, CA
Classification Study

City of Grand Rapids, MI
Classification and Compensation Study

Community College of Allegheny, PA
Classification and Compensation Study

Illinois State Board of Elections, IL
Compensation Study

Ingham County, MI
Classification and Compensation Study

Livingston County Community Mental Health, MI
Compensation Study

Mesa Public Schools, AZ
Compensation Study

Orange County Department of Education, CA
Classification and Compensation Study

Township of Ela, IL
Classification and Compensation Study

Work Experience

MGT Impact Solutions, LLC, Analyst, 2023-Present

Pape-Dawson Engineers, Inc., Human Resources Analyst, 2022-2023

United States Army, All-Source Intelligence Analyst; Security Manager, 2016-2022

Parker Hannifin: "Parflex" Division, Accounting Intern, 2014

Goehring, Rutter, and Boehm, Legal Administrative Intern, 2012

Part C: Project Approach and Work Plan

A detailed work plan and deliverables to guide a successful study.

Project Understanding

We understand that the City is seeking a Classification and Compensation Study for 55 jobs. This project will deliver a comprehensive, city-wide classification and compensation study for all Independence non-union positions, including updated, Americans with Disabilities Act (ADA)-compliant job descriptions and a defensible pay structure. **Benefits to the City** include a modernized human resources framework, improved employee recruitment and retention, transparent and equitable compensation practices, and a sustainable system for long-term workforce management.

For the City, we will deliver a structured and transparent study process that includes:

- A communications strategy to ensure key stakeholders are provided with necessary information and updates throughout the engagement, as appropriate.
- Job data collection and analysis using a consistent, equitable methodology to ensure accurate classifications and Fair Labor Standards Act (FLSA) exemptions statuses, and to identify any necessary consolidations or leveling of jobs.
- A classification structure that aligns with organizational roles and responsibilities and provides promotional and developmental growth and opportunities.
- Updated job descriptions as needed to ensure industry best practices and appropriate language, ensuring accurate descriptions of duties, minimum requirements, responsibilities, physical requirements, and work environment details.
- Market surveying and benchmarking through customized data collection and expert analysis to determine competitive pay and address compression or internal inequities.
- Updated competitive and flexible pay plan model with job pay range assignments, reflecting defined organizational policy and compensation goals.
- A benefits comparison assessment and recommendations for enhancing offerings.
- Implementation strategies with adjustment cost estimates for making any recommended adjustments.
- Draft and final reports detailing the study's methodology, findings, and recommendations, including guidance for maintenance and administration.

These components are incorporated into a phased work plan detailed in the following section. Each task is designed to promote stakeholder understanding, support consistent project communication, and ensure that the City receives actionable and defensible recommendations aligned with organizational goals and needs.

PROJECT MANAGEMENT

MGT uses proven project management methodologies to deliver projects on time, within budget, and aligned with client expectations. We prioritize planning and communication, clearly defining milestones, responsibilities, and deadlines, and tracking progress daily. After contract

award, we refine the initial work plan with your input, incorporating detailed timelines and consultant roles. Our teams adapt quickly to deviations using problem-solving, technology, and flexibility to meet deadlines. We maintain frequent communication through weekly updates and bi-weekly status calls, ensuring transparency and avoiding surprises.

MARKET DATA

MGT conducts benchmark compensation analyses using **Custom Market Surveys**. Our surveys assess not only pay and benefits, but also compensation philosophies, which are critical to understanding competitiveness and career advancement structures. MGT maintains ongoing relationships with numerous public sector clients, allowing timely access to market data and current industry trends.

We also recognize that recruitment markets vary by role. While some positions draw from local talent, others require broader or remote recruitment strategies. Fields like Information Technology (IT), Finance, and Administration often span multiple industries and geographic areas, requiring flexible market comparisons. To ensure accuracy and relevance, MGT uses multiple data sources to validate findings and reflect the real-world challenges of recruiting and retaining talent.

ENSURING EQUITY

Our team is committed to ensuring equity in the pay structures and compensation systems we recommend to our clients. We know how to help organizations ensure compliance while promoting fair and equitable pay practices. In addition to market factors, MGT also considers an organization's internal structure relative to hierarchy and supervisory lines when determining appropriate placement in a compensation system. We also review each pay range to ensure comparable jobs are assigned, while adjusting for any outliers. Ensuring equity includes guidance for regular reviews, transparent criteria, and ongoing training to promote fairness and inclusivity across all levels of an organization for long-term administration.

Proposed Work Plan

The following tasks represent MGT's proposed work plan for this engagement. The nature of these tasks requires that some be done sequentially, while others may occur simultaneously. We have specified those areas where the City's input/assistance may be needed.

PHASE I: PROJECT INITIATION AND ORIENTATION

1.1 Project Kickoff, Data Request, and Team Communications

MGT will meet with the City to introduce the project team, clarify roles, and confirm study goals and the work plan. This will include a review of data collection activities and expectations relative to the type and extent of employee involvement needed. This ensures that the project goals and expectations are clearly understood and that the study begins with shared understanding and a consistent framework. MGT will also discuss with the City the market goals and the strengths and limitations of the current system. These discussions will provide MGT with an understanding of current concerns and opportunities to address during the study.

Deliverables, decision points, and expectations for data submission to support study initiation will also be finalized. MGT will provide a structured worksheet outlining the data

needed from the City to begin the study, including current job titles and descriptions, organizational charts, employee rosters, salary schedules, personnel policies, and other relevant HR forms or procedures. MGT will conduct a preliminary review of the City's existing system to understand the current framework, identify any inconsistencies or known challenges, and begin shaping the study approach.

MGT and the City will also agree upon future communication expectations, including periodic update meetings and project status updates. MGT will maintain regular contact with the City to ensure all components of the study maintain alignment with the City's goals and expectations.

1.2 Employee Engagement and Communication

MGT offers a variety of communications support to orient employees to study goals. MGT often holds 1-2 orientation sessions with staff to introduce data collection activities, outline expected employee involvement, and provide an overview of the job analysis process to encourage staff engagement. MGT's facilitators will provide an overview of the Job Analysis Questionnaires (JAQs) process, walk through the form, and answer employee questions. A recorded version of the presentation will be made available to those unable to attend.

Following orientation, MGT will distribute JAQs. Messaging will be tailored to the audiences (employees, department heads, and executive leadership) to ensure consistent understanding of the study's purpose, timeline, and expectations. Tools may include talking points, email templates, frequently asked questions (FAQs), and messaging coordinated through internal leadership to build awareness and engagement.

Phase I Deliverables:

- Kickoff meeting agenda and summary
- Initial data request checklist
- Project team communication plan
- Employee communication plan

PHASE II: CLASSIFICATION AND JOB ANALYSIS

2.1 Job Analysis Questionnaire (JAQ) Administration

This activity focuses on gathering employee data and reviewing the City's current classification system to ensure it reflects actual job content and organizational needs. We will take a collaborative, employee-inclusive approach to job analysis using clear structured processes tailored to the size, structure, and operational complexity of the City.

MGT tailors the use of the JAQ process to gather any necessary data for study analyses while minimizing interruptions to employees' daily work routines. MGT will issue JAQs to employees to gather detailed information about current job duties, responsibilities, required qualifications, working conditions, and other factors. This structured input is essential to understanding what work is performed across the organization and provides the basis for job classification and market alignment. The JAQ may be administered via online survey, interview, and/or focus group.

Commonly, supervisors review employee-completed JAQs to confirm content accuracy and offer additional context. Supervisors cannot change the employee data; they can only add comments. In addition to the JAQ data review by supervisors, the supervisor JAQ process includes a section in which supervisors may provide further input regarding any

concerns for the given position, such as but not limited to issues of recruitment, retention, pay issues, career advancement gaps, outdated job titles, or exemption status concerns. Early insights into these concerns gathered help the MGT project team refine our approach and focus to ensure all aspects of the study are specifically tailored to the areas of most concern to the City and support relevant and practical recommendations at project completion.

In instances where more job data is needed to further clarify roles or issues, MGT will conduct targeted interviews as needed at the discretion of the consultant to ensure data validation and clarity (project budget allows for up to 55). These brief interviews clarify role responsibilities and ensure accurate understanding of job content prior to evaluation. Targeted focus groups may be conducted with incumbents to gather consensus on job data or to determine new classification levels, for example. This step ensures shared understanding of the work being performed and helps resolve discrepancies early in the process.

2.2 Job Description Updates

MGT will review the collected data and conduct job analyses to confirm each job's duties, qualifications, scope and responsibilities, level of authority, specializations, work environment, and physical requirements, and to identify any proposed adjustments relative to job title updates or reclassifications, consolidations, leveling, or FLSA exemption status changes. MGT will discuss the job analysis findings with the City's Project Officer and document any adjustments.

- **Job Description Format.** Review and develop an updated draft job description format, if desired. MGT will use a consistent format that aligns with the JAQ process to update the job descriptions and ensure compliance with applicable laws and best practices. All job descriptions will be updated in Microsoft Word format.
- **Job Data Review.** Evaluate the job data collected from the JAQ to support the updates as related to current duties, qualifications, scope and responsibilities, level of authority, knowledge, skills, abilities, equipment used, and ADA characteristics (i.e., physical, environmental, and sensory).
- **Job Description Creation/Updates.** Update job descriptions and submit electronic copies to the City for use.

2.3 Develop Proposed Classification Plan

This task focuses on translating job analysis findings into a consistent, equitable classification structure that reflects the City's internal needs. Using JAQ data validated through supervisory reviews, MGT will group jobs into appropriate classifications that reflect functional responsibilities, complexity, supervision received and exercised, and other relevant job factors. MGT ensures the structure supports logical career progression, internal alignment, and ease of maintenance over time.

Each job is evaluated using MGT's established point-factor system, which examines job data across multiple dimensions such as knowledge, complexity, decision-making, and working conditions. This process helps identify meaningful differences among roles and supports fair and objective classification decisions.

MGT applies job evaluation practices that align with standards recognized by the Equal Employment Opportunity Commission (EEOC) and are consistent with applicable laws including the Civil Rights Act of 1964 (Title VII), the ADA, and the Age Discrimination in Employment Act (ADEA). Our classification methodology is designed to focus solely on

the requirements and responsibilities of each job — not the personal characteristics, qualifications, or performance of the incumbent. In doing so, we help the City ensure that compensation decisions are equitable, transparent, and legally defensible.

Phase II Deliverables:

- Completed Job Analysis Questionnaires
- Job data review and analysis
- Updated job description format and job descriptions
- Proposed classification structure and preliminary recommendations

PHASE III: COMPENSATION AND BENEFITS ANALYSIS

Activities

3.1 Compensation Philosophy & Market Identification

- **Stakeholder Identification.** Identify and confirm with the City which key stakeholders need to be included in the Compensation Philosophy statement development sessions. Compensation philosophy statements clearly articulate an organization's values and goals relative to compensation management, guiding pay administration. MGT will schedule a Compensation Philosophy development session with stakeholders to discuss the steps in the process, including key considerations and discussion questions.
- **Discussion Sessions.** Hold and facilitate Compensation Philosophy discussion session(s) to determine the City's key compensation goals, discuss objectives of the statement and what will be included and excluded, and to review the organization's mission and vision to reaffirm Compensation Philosophy ideals. MGT will conduct discussion sessions with key stakeholders to identify desired attributes and to develop a formal compensation philosophy statement.
- **Statement Development.** Draft a sample Compensation Philosophy statement and work in tandem with key stakeholders to refine the statement. Complete revisions as needed and submit the final draft of the Compensation Philosophy Statement.
- **Custom Market Survey**. Working with the City, MGT will determine a logical and defensible survey sample of comparable agencies that influence the City's compensation market. In selecting appropriate organizations, we consider multiple factors including similar organizational structure, population served, number of employees, budget size, Equalized Assessed Valuation (EAV), and geographic proximity. MGT will benchmark a total of 50 jobs against 15 to 20 comparable agencies to assess competitiveness.

3.2 Administer Market Surveys and Conduct Benchmark Comparisons

- **Custom Market Survey**. MGT will prepare a tailored market survey that either MGT or the client will distribute to the identified comparable agencies. The survey will include benchmark job titles and summary descriptions to ensure valid data collection, along with a request for copies of job descriptions for verification. MGT will provide survey status updates and conduct online research and outreach to non-responsive organizations as needed to maximize participation. The City may be asked to send the survey directly or conduct targeted outreach to increase response rates. After the survey closes, MGT will analyze the results to ensure comparability.

- **Benchmark Comparisons.** MGT will select appropriate benchmarks for the City's jobs and conduct market comparisons to assess the competitiveness of the existing pay ranges. MGT will compile the comparisons into tables to show the City's current compensation levels alongside the market data to identify which jobs are considered above, at, or below market.
- **Current Benefits Review.** Gather and review current benefits data from the City and clarify any questions about the data. Includes drafting an overview of the current state of benefits.
- **Prepare a Benefits Chapter.** Draft report detailing the process, comparisons, findings, and recommendations from the review. The draft will be reviewed with the City for discussion and feedback, and MGT will complete any necessary revisions before finalizing.

3.3 Pay Plan Development

Using MGT's proven job evaluation methodology, we will assess internal equity and develop/update a plan that supports transparency, fairness, and alignment with organizational policy and goals. MGT will develop a draft pay model that reflects the City's compensation philosophy, budgetary capacity, and strategic priorities. We evaluate the feasibility of different plan designs such as step-based structures or open ranges and recommend the most suitable option for the City's workforce and fiscal environment. Each job is assigned to a pay grade based on internal job evaluation results and market data. This includes internal equity and compression adjustments ensuring that the resulting structure is market competitive while also internally equitable.

Phase III Deliverables:

- Target markets and comparables list
- Market survey administration
- Survey status and response summary
- Market data analysis tables
- Review of current benefits
- Administration of benefits data collection
- Draft pay plan(s)

PHASE IV: FINAL REPORTING AND IMPLEMENTATION

Activities

4.1 Fiscal Impact and Implementation Strategy

MGT will develop a summary of estimated implementation costs that shows the projected cost of implementing the proposed recommendations, which may include two options for phase-in (e.g., immediate implementation, multi-year rollout). Costing will estimate the fiscal impact of implementing the pay structure updates, including identifying projected base pay adjustments by job and potential areas of internal compression or equity concern. Overtime costs are not included, and the analysis will be estimates only. MGT will prepare guidance for adopting and administering the new system, which may include employee placement protocols, guidelines for salary movement, and procedures for evaluating and maintaining job consistency. MGT views implementation not as an afterthought, but as an integral part of the study that ensures the work completed results

in actionable outcomes. Upon completion of all revisions, MGT will submit a final version of these strategies.

4.2 Study Draft and Final Reports

MGT will prepare and provide a comprehensive draft report that documents the study's background, goals, methodology, data selection and collection, findings of analyses, proposed system framework, recommendations, implementation strategies and costs, and guidelines for administration and maintenance. MGT will facilitate a structured draft report review with the City to respond to feedback, questions, or requested changes. We will review and respond to feedback and incorporate any needed revisions into the final report.

4.3 Presentation and Training

- **Final Presentations.** The MGT Project Manager will present the finalized study recommendations and final report to the City's leadership and/or staff, if desired. This may include a Study Results Summary handout and/or a Final Presentation format. MGT provides up to two final presentations.
- **Support Knowledge Transfer and Ongoing Use**. MGT will provide the City with the tools, documentation, and training needed for successful implementation and long-term sustainability. MGT will work closely with the City to provide staff training during the project as the system is developed. MGT will also train key staff on the study's files to support implementation and ongoing maintenance and administration of the system.

Phase IV Deliverables:

- Draft and final reports
- Final presentations and internal communication resources
- Staff training materials and documentation

MGT always strives to perform above and beyond client expectations for our projects. Each project has its own challenges, and MGT is an active partner in weathering the fiscal and political concerns of our clients to ensure there is an accepted, practical, and implementable result at the end of our studies.

PROJECT DELIVERABLES SUMMARY

Upon completion of this city-wide classification and compensation study, the City of Independence will receive a fully integrated and actionable human resources framework. The project will provide clear, defensible, and sustainable tools to manage job classifications, pay structures, and employee growth, enabling equitable and competitive compensation practices while supporting the City's operational and strategic objectives.

Final Project Deliverables:

- Comprehensive final report summarizing methodology, analysis, findings, and recommendations.
- Complete set of updated, ADA-compliant job descriptions in editable electronic format (e.g., Microsoft Word).
- Recommended classification plan and salary structure(s) in an easy-to-use, maintainable electronic format (e.g., Excel).

- Written policy and procedure manual for ongoing administration and maintenance of the new classification and compensation system.
- All raw market survey data collected from comparable organizations.
- Position-by-position fiscal impact analysis for implementing the recommended pay plan.
- Multi-year implementation strategy with at least two cost scenarios for budget planning.
- Formal presentation to City management and City Council summarizing project findings and recommendations.
- Training for designated City staff on administering and maintaining the new system to ensure long-term sustainability.

Work Plan Assumptions

Providing assumptions helps the entire team (client and consultant) fully understand each other's expectations for the project. The following outlines our work plan assumptions:

1) The City will assign a Project Officer before or at project kickoff to serve as the main contact, coordinating communication between the City, stakeholders, and MGT.
2) All project phases will include input from the Project Officer and the City's key stakeholders. MGT views this work as a partnership, and the insights provided by stakeholders are essential to ensuring outcomes align with the City's mission, vision, and goals.
3) MGT will need reasonable cooperation and participation by staff and management and timely access to the City's data. Delays in receiving data or input during the study may result in time extensions to the original project schedule.
4) MGT will request employee/job data in a standard Excel format. To stay on schedule, the City should provide a usable database within about two weeks. MGT's initial work depends on receiving this data and will promptly notify the City if the file doesn't meet specifications. All employee data provided will be assumed accurate and valid.
5) Requests to add benchmark jobs or comparable agencies beyond the original scope will require a change order and contract amendment to reflect additional costs. These requests should be submitted by the City's Project Officer to the MGT Project Manager for review and approval before inclusion in the analysis. This proposal's budget covers up to 50 benchmark jobs and 15 to 20 comparable agencies. Additional jobs may be added for additional fee each.
6) If the City prefers for MGT to utilize additional sources of salary data other than MGT's Custom Market Survey and the Salary.com CompAnalyst tool (e.g., a subscriber service, or regional salary survey), the City will facilitate MGT's access and assume any associated costs.
7) MGT will develop and provide up to two Draft Reports for review and feedback by the City's Project Officer and other key staff before preparing the Final Reports. Final reports are assumed to be final if we do not hear from the City within three weeks of final report delivery.
8) This proposal includes two presentations of the final recommendations. Additional presentations can be provided upon request for an added fee.

The entire study process is transparent, and all data collection instruments, methodology, and final outcomes will be documented in the Final Report in detail. All files are provided to the City in Excel or Word formats for maximum implementation efficiency and periodic updating.

Project Timeline

Based on MGT's experience conducting similar projects, we anticipate the proposed project can be completed within **six months** of project initiation as illustrated in the following table. Our structured approach ensures that all phases are completed efficiently and accurately, while maintaining a high standard of quality and stakeholder engagement. MGT's proposed timeline includes buffers to account for the effect of holidays or other events to the project schedule. The proposed schedule is contingent upon the timely engagement and response of the City in providing data or key input, employees and supervisors completing JAQs by the due date, and from the comparable agencies supplying the market data. Any delays in these instances are beyond the control of MGT and may extend the project completion date.

Exhibit 1. Proposed Schedule

WORK PLAN TASKS	Month 1				Month 2				Month 3				Month 4				Month 5				Month 6			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
Phase I: Project Initiation and Orientation	■	■	■																					
Phase II: Classification and Job Analysis				■	■	■	■	■	■	■	■	■												
Phase III: Compensation and Benefits Analysis												■	■	■	■	■	■	■	■	■				
Phase Iv: Final Reporting and Implementation																					■	■	■	■

Work Samples

A sample of a final report and a sample job description from a previous, similar municipal project are provided on the following pages.

JOB DESCRIPTION

Position Title	Department	Reports to
Project Manager – Building Code Inspector Grade: 6	CD/ED	Director of CD/ED
Employment Status	**FLSA Status**	**Effective Date**
☐ Temporary ☒ Full-Time ☐ Part-Time	☐ Non-Exempt ☒ Exempt	7/2025

POSITION SUMMARY

This position is responsible for performing technical and advisory work in the administration of federal and state grant programs by working with city and county governments, owners, housing contractors, inspectors, and tenants of housing and the general public. Provides inspection services to ensure that buildings constructed in the city requesting services comply with the adopted city building codes and other relevant laws and ordinances. This position often requires some discretion where the potential impact of erroneous decisions or judgments is serious.

ESSENTIAL DUTIES AND RESPONSIBILITIES

An employee in this position may be called upon to do any or all of the following essential functions. These examples do not include all duties the employee may be expected to perform. To perform this job successfully, an individual must be able to perform each essential function satisfactorily, with or without reasonable accommodation(s).

- Provides technical planning services conducting office and field research, preparing analysis, and completing written community comprehensive plans and community builder plans.
- Assists in developing and improving housing programs.
- Develops project proposals in cooperation with local, state, and national public and private agencies
  and assists in project implementation.
- Coordinates the activities of the building inspection program in cooperation with the Community Development Department's activities as well as with member cities.
- Assists member governments and their agencies in community development projects and programs.
- Meets with city councils, county boards of supervisors, local organizations, arrange meetings, and maintain contact with state and federal agencies and interest groups.
- Completes paperwork relating to federal and state grant programs including draw down requests.
- Responsible for overseeing state and federal monitory visits as well as completing required reports.
- Assists in preparing budgets and coordinates with the auditor in program audits.
- Reads and interprets all program regulations. Reviews and interprets building codes which regulate
  The inspection and installation of building systems and related codes, ordinances, and laws.
- Advises member communities with respect to inquiries and concerns relating to building policies and procedures and works closely with homeowners, contractors, and inspectors.
- Examines building plans and blueprints and technical data.
- Files oral and written reports and communicates with contractors, member cities, and the general

public.

- Investigates and inspects complaints and reports to the member community of potential code violations, hazardous conditions, polluting, or other related code-related matters.
- Refers code violations to the appropriate city for follow up.
- Assists with inspection of housing to determine if conditions and facilities meet standards and are suitable or inclusion in the housing rehabilitation program. Inspect rehabilitation work and at completion to ensure contract compliance.
- Provides information to local governments and the public concerning requirements and procedures of federal and state grant programs regarding housing and community development needs.
- Inspects for compliance local code compliance and setback requirements.
- Assumes primary responsibility for enforcement of member communities' building codes.
- Maintains manual and computerized inspection records.
- Advertises programs for homeowners, qualifies homeowners, obtains work write-ups, and approves contracts.
- Travels to conferences, training, and member governments regularly with both daytime and evening meetings as well as overnight conferences.
- Keeps immediate supervisor informed of daily activities and staff informed on projects underway.
- Follows safe work practices and adheres to all adopted policies and procedures related to safety protocols.
- Demonstrates sensitivity, empathy, understanding and respect for all contacts and organization employees and leaders.
- Provides effective and efficient customer service, which promotes and maintains a culture of responsive community relations.
- Keeps up to date on industry trends and maintains required training, licensure, and/or certification(s).
- Performs related work as required.

QUALIFICATIONS

Completion of a bachelor's degree in environmental science, public administration, business administration, construction management, or related field. One to three years' experience in real estate, property management, social work, housing inspections, and/or working in a governmental setting is preferred.

LICENSE AND CERTIFICATION REQUIREMENTS

Possession of a valid driver's license and be insurable under ECIA's and EIRHA's insurance policy.

KNOWLEDGE, ABILITIES AND SKILLS

- Knowledge of federal and state grant programs and grant administration principles and practices.
- Knowledge of housing and building codes and regulations.
- Ability to obtain various building code certifications relating to inspection areas.
- Ability to maintain effective working relationships with member communities, contractors, lending institutions, other businesses agencies, and the public.
- Ability to handle multiple tasks and priorities.
- Ability to compile technical and statistical information, analyze the results, and write clear and concise reports.
- Ability to maintain records and procedures.
- Ability to work independently and in a team environment.

- Skill in using a personal computer, applicable software, and peripheral equipment to achieve tasks.
- Skill in providing information to the public, contractors, or others with a mutual interest in organization functions.
- Skill in handling interactions related to organization operations and internal and external contacts requiring skill in dealing with others and clearly communicating information.

PHYSICAL REQUIREMENTS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions in a manner that does not pose a direct threat to the health or safety of the employee or others in the workplace.

While performing the daily duties of this job, the employee is frequently required to remain in a stationary position, move throughout the office, and attend meetings at offsite locations. Inspections require the employee to walk over varied outdoor terrain. The employee will speak and hear to communicate with coworkers, member communities, contractors, other agencies, and the public. To utilize tools required of the position, the employee will use hands and fingers to handle, feel, or operate objects, tools, or controls; and reach with hands and arms.

Specific vision abilities required by this job include close vision, prolonged visual concentration, and the ability to adjust focus with exposure to video display terminals daily. The employee may be required to bend, climb, balance, stoop, kneel, crouch, or crawl at project locations. The employee may occasionally be exposed to adverse weather and other unpleasant conditions such as heat, cold, wetness, and humidity, dim or bright lights, dust, odors, noise, vibrations, toxic agents, smoke, electrical current, and heavy machinery.

EEO STATEMENT

THE EAST CENTRAL INTERGOVERNMENTAL ASSOCIATION (ECIA) IS AN EQUAL OPPORTUNITY EMPLOYER COMMITTED TO DIVERSITY AND INCLUSION IN THE WORKPLACE. We prohibit discrimination and harassment of any kind based on race, color, sex, religion, sexual orientation, national origin, disability, genetic information, pregnancy, or any other protected characteristic as outlined by federal, state, or local laws. This policy applies to all employment practices within our organization, including hiring, recruiting, promotion, termination, layoff, recall, leave of absence, compensation, benefits, training, and apprenticeship. The ECIA makes hiring decisions based solely on qualifications, merit, and business needs at the time.

This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

PREPARED BY MGT

Final Report

JULY 2025

Classification and Compensation Study

Submitted by:

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EXECUTIVE SUMMARY

MGT is pleased to have had the opportunity to work with the East Central Intergovernmental Association (ECIA) on this Classification and Compensation Study. Human resource management is a significant concern as governmental services continue to increase in cost and complexity, and the resources to fund local governments are constrained. Day-to-day operations present challenging administrative problems in planning, organizing, and directing human resource functions in order to achieve maximum efficiency and effectiveness in the delivery of municipal services. A properly developed and administered Classification and Compensation Plan forms the foundation for meeting these challenges. It helps to ensure that the Association can not only recruit the best and brightest employees but can also retain those employees, even in a competitive marketplace. By retaining qualified, experienced employees, the Association avoids the costs of re-recruitments and lost productivity while maximizing the benefits of the investments it has made in employees and the institutional and community knowledge acquired by those employees over their tenures.

MGT understands the high expectations established in ECIA for service delivery and competitiveness in recruiting and retaining excellent employees. These factors have been considered in the analysis and reflected in the Study results.

A Classification and Compensation Study encompasses a significant amount of information that can be time-consuming to condense and organize into an abbreviated format. Therefore, MGT has compiled this Executive Summary in order to provide a quick synopsis regarding the major components, findings and recommendations of this Study. The purpose of a well-designed Classification and Compensation Study is twofold. First, it establishes internal equity (ranking) among employees across Departments in the Association. Second, it assures external equity/competitiveness by comparing the compensation of ECIA employees against market data. The following is a brief overview of the process:

Job Evaluation Analysis and Job Classification System

Below is a list of tasks included in this component of the Study (listed in the order that the work was performed):

- **Study preparation and project meetings**. Met with the ECIA Project Team to discuss Study methods and expectations, review the current Classification and Compensation Plan and organizational structure, answer questions, and review the scope and schedule of work.
- **Material distribution**. Prepared a memorandum of explanation, which was distributed to employees. Held meetings with employees to discuss the Job Analysis Questionnaire (JAQ) and to explain the scope and purpose of the Study. Employees were provided time to complete the questionnaire. The JAQs were returned to MGT within approximately three (3) weeks of distribution.
- **Determined comparable organizations and collected compensation data.** MGT, along with the Association, determined a logical survey sample of “like” organizations that impact the compensation market of ECIA. Then, MGT designed, and the community sent out the survey for the positions and benefits covered in the Study.

- **Job Evaluation Analysis and Establishment of a Classification Plan**. Upon return of the JAQs by the Association, MGT performed the following:
    - Read each JAQ and corresponding Job Description in its entirety.
    - Conducted virtual interviews with at least one (1) employee in each position covered by the Study to further understand the scope of duties and responsibilities of the position.
    - Applied a measurement system of Job Evaluation Factors to all positions, which formed the basis for internal rankings (equity) of positions.
    - Upon completion of the Job Evaluation measurements, a new Classification Plan was developed.

Market Survey

The following tasks were included in this component of the Study:

- Tabulated, summarized, and analyzed comparative compensation information obtained from the comparable organizations. Prepared pay tabulations that compared the salary ranges of ECIA to the salary ranges of its comparable organizations. Prepared comparison calculations at the 50th, 60th, 65th, 75th and 80th percentiles. Displayed data for each organization and for each position and summarized the data in table form. Based on discussions with the Association and the gathered data, developed salary ranges that would establish ECIA as a payer at the 75th percentile or higher of the salary data from the comparable organizations.
- Based on the above data, developed, and recommended new salary schedules.
- Analyzed and summarized the benefit information.

Draft and Final Report Preparation

- A preliminary analysis of the data and recommended Classification and Compensation Plan was shared with the Association. Feedback from ECIA Administration was reviewed and incorporated into the recommendations.
- A draft report was prepared by MGT and sent electronically to the Association.
- A presentation of these draft findings was conducted for the Board.
- This final report has been prepared and transmitted electronically.

Future Administration of the Classification and Compensation Plan

- Within the body of this report, MGT has outlined how the Association can maintain the Classification and Compensation Plan. MGT will supply the Association with a User's Manual and all associated documents to maintain the Classification and Compensation Plan and the steps to ensure the Association remains competitive with the market in the years to come.

JOB EVALUATION

MGT's approach to Job Evaluation involves a quantitative point and factor comparison method, which cross-compares all positions in the organization against numerous factors such as educational requirements, experience, work conditions, etc. Therefore, all jobs in each organizational unit (e.g., Finance & Administration, Special Programs, etc.) may be compared against each other based upon the same factors.

In conducting the Job Evaluation, it must be emphasized that the position, and not the incumbent's qualifications, performance, or years of service in the position, is evaluated. An incumbent employee may feel they should be placed in a higher level (i.e., receive more points) because the individual performs well, has a long tenure with the organization, and/or has additional education or skills not required to perform that job, or may feel they have a more significant workload than a similar employee in another Department; however, these are employee specific characteristics and not determinants for a position evaluation.

Before reviewing the results of the evaluation of the positions, it is important to note that the purpose of a Job Evaluation is to identify whether a job is more or less advanced than, or equal to, other jobs in the organization based on nine (9) objective factors. While these factor definitions are guidelines, they are constructed to allow limited flexibility of interpretation while at the same time providing a strict framework and structure for comparison. The nine (9) factors used for the evaluation of ECIA's positions are as follows:

1. Preparation and Training
2. Experience Required
3. Decision-Making and Independent Judgment
4. Responsibility for Policy Development
5. Planning of Work
6. Contact with Others
7. Work of Others (Supervision Exercised)
8. Working Conditions
9. Use of Technology/Specialized Equipment

As part of the Job Evaluation process, the duties, responsibilities, and qualification requirements for each position were reviewed via a thorough reading of the incumbent's current job description and a Job Analysis Questionnaire (JAQ) completed by each employee (Appendix A). In addition, MGT conducted interviews with at least one (1) employee in each of the positions covered by the Study. Points were then assigned to each factor by selecting the description that best fits the appropriate level for the position. In other words, a position that supervises ten (10) full-time staff members would receive more points under the "Work of Others" factor than positions that do not supervise. Points for each factor were then totaled for each position. Using this method, the positions were found to fall into distinguishable Skill Levels. Table 1 contains the Classification Plan, including the Position Title, Skill Level, and proposed Grade for the evaluated positions.

As part of the service provided in the Compensation Study, MGT makes Job Title change recommendations to either reflect a better description of the job being performed or to be consistent with trends in the organization or the marketplace. Based on this, MGT recommends the following Job Title changes:

Current Job Title:	**Proposed New Job Title:**
Maintenance Manager	Maintenance Technician
Family Support Specialist	Family Support Coordinator
Housing Support Specialist	Housing Support Coordinator
Administrative Services Manager	Administrative Support Coor. – Finance
Community Development Coordinator	Project Manager - Inspector
Community Outreach/ED Coordinator	Program Specialist – Comm. Outreach/ED
Finance and Documentation Specialist	Economic/Community Dev. Specialist
Housing and Grants Dev. Coordinator	Program Specialist – Housing and Grants
Grants Specialist/Inspector	Project Manager – Grants
Lead and Building Code Inspector	Project Manager/Inspector
Rehab Specialist – Building Code Inspector	Project Manager - Building Code Inspector
Brownfields Coordinator	Project Specialist – Brownfields
Grants and Municipal Coordinator	Project Specialist – Grants and Municipal

Additionally, during the Study, MGT identified certain positions that had been assigned temporary or additional duties that are not part of the job or job description. As an industry best practice, MGT recommends that employees taking on these temporary assignments receive a monthly stipend, as determined by the Association. Typically, this stipend is approximately $250 per month. The stipend should be discontinued once the additional duties have concluded or are no longer assigned to the individual.

THE CLASSIFICATION PLAN

A Classification Plan provides for a systematic arrangement of positions into classifications. A position, often referred to as a job (e.g., Receptionist), contains a specific set of duties and responsibilities, and that is the objective of the classification process – not the person currently holding that job. A classification is a grouping of positions that have similar levels of knowledge, skills, and abilities needed to perform the job. The positions are also similar in nature of work, level of work difficulty and responsibilities. Positions allocated to the same classification are sufficiently similar with respect to the types of factors enumerated above to permit them to be compensated at the same general level of pay. The positions do not have to be identical; they can be in different departments, dealing with different subject matters and performing different duties.

It is this arrangement of positions and resulting classification structure that forms the basis for the Classification Plan. As noted in the previous section, a Job Evaluation and Classification Plan is not intended to assess individual performance. To that end, a position that belongs in a certain classification is not entitled to be placed in a higher classification simply because the individual performs with a high degree of success and efficiency, nor is it placed in a lower classification simply because the incumbent performs with low competence or productivity. Variations in individual performance are not recognized by differences in classifications, instead they are management issues. Similarly, there is a tendency in some workforces to use the Classification Plan to reward longevity, even though the duties and responsibilities of individual positions may not have changed over time. Longevity is not a classification factor, and the Classification Plan should not be used in this manner.

As an assessment of duties performed and responsibilities exercised, a Classification Plan is an exceedingly useful managerial tool. It provides the fundamental rationale for the Compensation Plan and helps management identify positions that have taken on (or, in some cases, reduced) duties and responsibilities. Through proper maintenance of the Classification Plan, employees are assured of management's continuing concern about the nature of the work that they carry out and its reward in the form of appropriate pay levels and relationships. The Classification Plan also provides the basis for recruitment, screening, and selection of employees in direct relationship to job content. Promotional ladders, as well as opportunities for lateral career development, are also evidenced by the logical grouping of allied occupational classifications and hierarchies.

SALARY AND BENEFIT DATA

The Association initiated this Study with the objective of assuring that its Compensation Plan is both internally equitable and externally competitive. The Job Evaluation System (outlined above) is performed to address the issue of internal equity. To achieve external competitiveness, a market survey of comparable organizations was conducted. The following explains the labor market review and collection of salary data.

Selection of Comparable Organizations for Data Purposes

To select which organizations should be used for survey purposes, the Association and MGT considered other Councils of Government (COGs), Regional Planning Councils (RPCs) and Metropolitan Planning Councils (MPCs) in Iowa, as well as cities, Transportation Authorities (TAs) and Housing Agencies/Authorities (HAs) in the region providing similar services as ECIA.

The full list of the thirty-two (32) comparables is below:

Area 15 Regional Planning Council	*MIDAS COG*	*Southeast Iowa RPC*
Bi-State Regional Commission	*North Iowa Area COG*	*Southern Iowa COG*
Chariton Valley Plan & Dev Council	*NW Iowa Plan & Dev Commission*	*SW Iowa Planning Council*
East Central Iowa COG	*Region 6 Resource Partners*	*Upper Explorerland RPC*
Iowa Northland Regional COG	*Region XII COG*	
Metro Area Planning Agency	*Siouxland Interstate MPC*	
City of Ames, IA	*City of Dubuque, IA*	*City of Waterloo, IA*
City of Cedar Rapids, IA	*City of Iowa City, IA*	
City of Davenport, IA	*City of Madison, WI*	
10-15 Transit	*North Iowa Regional HA*	*Regional Transit Authority*
Des Moines Municipal HA	*NE Iowa Community Action Corp.*	*River Bend Transit*
Heart of Iowa Regional TA	*NW Iowa Regional HA*	*South Iowa Trolley*

Market Survey

After identifying the benchmark positions, the Consultants then prepared and distributed a market survey to the thirty-two (32) comparable organizations. Eleven (11) of the comparable agencies responded to the survey, while data for an additional nine (9) comparables was obtained from the FY25 ICOG Salary Survey. Table 1 is a summary of the benchmark market survey data.

It is important to make a few observations regarding the market data.

1) The salary data is information that was available as of March 2025. The new recommended salary ranges for the Association were developed using this salary data from the comparable organizations.

2) Some of the comparable municipalities provided salary range minimums and maximums for comparison purposes, while others (those that don't utilize salary ranges as part of their pay plans) provided actual salaries for surveyed positions. The salary range minimums and maximums were analyzed to determine the 50th, 60th, 65th, 75th and 80th percentiles to identify wage ranges for "average" and "above average" payers. Any actual salaries provided by the comparable municipalities were only analyzed in a few instances when there was not enough salary range information. Salary ranges are a better gauge of market salaries than an actual salary and are thus preferred to conduct analysis.

3) All market data was thoroughly reviewed.

Appraisal and Use of Salary Data

While comparing ECIA's current salaries to those paid by other employers in the comparable organizations, it must be noted that variations in compensation may be due to several factors, including:

1) Organizational size and economic conditions can have an impact on positions. In smaller organizations, employees are often asked to "wear many hats" and, therefore, take on more duties and responsibilities than would normally be required of a certain position. In addition, the economic downturn forced organizations to "do more with less", compelling staff to take on more duties and responsibilities than they have in the past. Therefore, it becomes increasingly harder to compare "like" positions within organizations.

2) Some employers place different relative worth on certain groups of employees. For example, some employers are forced to place a higher value on certain employees or groups of employees because of the market and, therefore, pay them more. Overall, the policies and value judgments of different employers in compensating for the same kind of work can vary widely. There is rarely a single prevailing rate for any particular kind of work, even within the same labor market.

3) It can be difficult to make exact comparisons among the different employers of the duties and responsibilities of ostensibly similar jobs.

Nevertheless, comparative salary data is widely considered a reliable indicator of appropriate compensation levels in relation to the prevailing market. This data is also useful as an indication of prevailing opinions concerning the compensation relationships that should exist among different classifications of work. Of equal importance, however, are the internal relationships for the various positions that were accomplished in the Job Evaluation portion of this Study.

For the purposes of this study, a review of private-sector salary data was also included. MGT subscribes to Salary.com's CompAnalyst online database for up-to-date private sector data. The following employment market area was used in the analysis:

1) Iowa (State)
2) All Industries
3) 100-200 FTE

The industry scopes that were applied to the data were as follows:

1) March 2025
2) Minimum/Maximum

The Market Survey Benefits and Findings

A review of the benefits offered in ECIA versus the comparable organizations shows that the Association's benefits are competitive with the other entities surveyed. However, there are some differences that are noted below:

Health Insurance

Health Plan

Thirteen (13) peers offer a PPO plan; five (5) peers offer an HMO plan; three (3) peers offer an HDHP plan; and two (2) peers offer a Point of Service (POS) plan. **ECIA offers a PPO plan to employees.**

Premium Coverage

Peer agencies report contributing between 75% and 100% of the employee only health insurance premium and between 50% and 100% of the family health insurance premium. Some peers provided specific dollars amounts contributed rather than percentages**. ECIA contributes 86% of the employee only plan premium and 85% of the family plan premium.**

Dental Insurance

Sixteen (16) peers provide Dental Insurance; of these, eleven (11) peers provided contribution percentages. In regards to employee only plans, four (4) peers contribute 0%, two (2) peers contribute between 50% and 90% and five (5) peers contribute 100% of the employee only premium. In regards to family plans, six (6) peers contribute 0% and five (5) peers contribute between 36% and 90% of the family premium. **ECIA's contribution accounts for 100% of the employee only plan premium and 27% of the family plan premium.**

Vision Insurance

Fifteen (15) peers offer Vision Insurance; of these, ten (10) peers provided contribution percentages. In regards to employee only plans, four (4) peers contribute 0%, three (3) peers contribute between 50% and 88% and three (3) peers contribute 100% of the employee only premium. In regards to family plans, five (5) peers contribute 0% and five (5) peers contribute between 50% and 100% of the family premium. **ECIA's contribution accounts for 100% of the employee only and family plan premiums.**

Life Insurance

Eighteen (18) peers provide life insurance at either dollar amounts of $10,000 to $50,000 or an amount of one (1) or two (2) times annual salary up to $50,000, $100,000 or $200,000. **ECIA provides Life Insurance of $25,000.**

Holidays

Nineteen (19) peers offer a range of eight (8) to thirteen and a half (13.5) holidays, with an overall average of approximately eleven (11) holidays. **ECIA offers eleven (11) paid holidays.**

Personal Days

Nineteen (19) peers offer a range of zero (0) to three (3) personal days, with an overall average of approximately one (1) personal days. **ECIA offers personal days, but it is part of the sick leave time bank. Employees can use up to seven (7) sick days as personal days.**

Sick Days

Fifteen (15) peers offer a range of (8.3) to (19.5) sick days with an overall average of approximately thirteen (13) sick days. Four (4) peers offer combined Paid Time Off (PTO) rather than separate sick days. **ECIA offers twelve (12) sick days per year.**

Vacation

When compared to the fifteen (15) peers offering separate vacation leave rather than combined PTO:

- At 1 year of service, ECIA offers ten (10) days per year and the peer average is approximately eleven (11) days per year.
- At 5 years of service, ECIA offers fifteen (15) days per year and the peer average is approximately fifteen (15) days per year.
- At 10 years of service, ECIA offers eighteen (18) days per year and the peer average is approximately eighteen (18) days per year.
- At 15 years of service, ECIA offers twenty-one (21) days per year and the peer average is approximately twenty (20) days per year.
- At 20 and 25 years of service, ECIA offers twenty-five (25) days per year and the peer average is approximately twenty (20) days per year.

Other Benefits

Below is a summary of additional benefits offered by peers.

- Eight (8) peers offer short-term disability.
- Fourteen (14) peers offer long-term disability.
- Five (5) peers offer sick leave donation or buy back.
- Nineteen (19) peers offer retirement plans.
- Five (5) peers offer retiree health insurance.
- Two (2) peers offer PTO banks.
- Six (6) peers offer education assistance/tuition reimbursement program.
- One (1) peer offers a vehicle allowance.
- Two (2) peers offer a cell phone allowance.
- Six (6) peers offer employee assistance programs (EAP).
- One (1) peer offers paid parental leave.
- One (1) peer offers childcare assistance.
- One (1) peer offers dependent care assistance.
- Zero (0) peers offer adoption assistance.
- Three (3) peers offer wellness programs.
- Zero (0) peers offer fitness center/gym discounts.
- Zero (0) peers offer PTO to volunteer or pet insurance.

ECIA offers short-term disability, sick leave donation or buyback, a retirement plan, retiree health insurance, vehicle allowance (only for the executive director), cell phone provision and a wellness program.

COMPENSATION PLAN DEVELOPMENT AND RECOMMENDATIONS

Development of the Compensation Plan

A basic element in any human resources management program is adequate and equitable employee compensation. A Compensation Plan of this nature is essential if qualified employees are to be recruited and retained. To achieve this goal, there must be a reasonable and widely accepted model of Job Factors upon which the Compensation Plan rests. Application of this model was the purpose of the Job Evaluation aspect of this Study. The Plan presented in this report is designed to accomplish the Study goals by:

1) Providing for equal compensation for work of equivalent job content and responsibility.
2) Facilitating adjustments to compensation levels based on changing economic and employment conditions that impact these interrelationships.
3) Establishing compensation ranges that compare favorably with those of other equivalent organizations within the appropriate labor market.

In preparing this Plan, the Study only looked at base compensation. The compensation associated with longevity or other fringe benefits was not analyzed or factored into the Compensation Plan.

Compensation Plan Options for the Association's Consideration

One of the purposes of this Study was to provide an updated Compensation Plan that relates to the external market and is internally equitable. Below is a detailed explanation of three (3) different Compensation Plans:

1) Defined Increment Plan: This is a Compensation Plan that has salary ranges with a minimum and a maximum with defined percentage increments (e.g., 3%) in between. If an employee has a satisfactory performance evaluation, they systematically advance through the compensation range. The performance evaluation and resulting salary increment increase occurs annually.
2) Open Range Merit Plan: This is a Compensation Plan that also has salary ranges with minimums and maximums, but without defined percentage increments in between. Employees are advanced through the compensation range based on an annual satisfactory performance evaluation, with the percentage of their increase determined annually by Association Administration.
3) Blended Merit Plan: This is a Compensation Plan that uses techniques from both a Defined Increment Plan and an Open Range Merit Plan.

In considering which Plan to use, it is important to understand that employees at various levels of responsibility may react differently toward, and be motivated differently by, the Compensation Plan they work under. Management personnel that are goal-oriented may have a higher acceptance of the Open Range Merit Plan, and thus tend to be more comfortable with this method of compensation. Mid to lower-level positions may want the assurance of a defined salary increase based on satisfactory performance.

Each system provides for advantages and disadvantages which should be evaluated by the community to determine the most appropriate system to be established.

Recommendation: Defined Step Increment Plan

MGT recommends that ECIA keeps a Defined Step Increment Plan, similar to their current structure. A Defined Step Increment Plan has salary ranges with defined percentage increments from the minimums of the range to the maximum. Employees are advanced through the ranges based on an annual satisfactory performance evaluation.

The Defined Step Increment Plan is similar to the Association's current plan and also allows maximum flexibility for the Association relative to recruitment and funding as employees can be hired within the range at a specific step. Given ECIA's goal to recruit, reward and retain motivated, high-performing employees, the Defined Step Increment Plan has been selected for recommendation.

Proposed Compensation Plan and Structure

Within the market analysis, MGT refers to "percentiles" (for example: 50th, 60th, 65th, 75th and 80th percentiles). Percentiles indicate where salaries or salary ranges fall in comparison to the other salaries or salary ranges from the comparable organizations. The 50th percentile is the median (or middle) of the data set. When a community is considering which percentile to compensate employees at, they are deciding where they want their employee salaries and salary ranges to fall within the market of comparable organizations. For example, if a community selects the 50th percentile, that means they would be paying a fair market rate at the 50th percentile or middle of the comparable organizations. If a community selects the 60th percentile, then the salary ranges would be 10% higher than the middle of the market.

An important component in the process of developing a Compensation Plan is understanding and applying the pay philosophy of the Association. For the purposes of this study, the Association is considering a pay philosophy of compensating employees at the 75th percentile or higher.

The next step in this process is to combine the Skill Levels included in Table 1 with the proposed salary ranges in Table 2. The Classification and Compensation Plan consists of fifteen (15) pay grades; one (1) being lowest and fifteen (15) being highest.

The proposed compensation framework introduces eight (8) clearly defined step increments within each pay grade, ensuring uniform progression with consistent increases between steps. This structured approach promotes transparency and predictability in employee advancement.

To foster equitable financial growth across all levels, the pay range spreads are designed to decrease as grades ascend:

- **Grades 1–6**: 40% range spread
- **Grades 7–8**: 35% range spread
- **Grade 9**: 30% range spread
- **Grades 10–13**: 20% range spread
- **Grades 14–15**: 18% range spread

This graduated narrowing of range spreads ensures that dollar amount increases remain consistent and fair across all grades, aligning with best practices in compensation design.

Market Alignment Strategy

Upon reviewing current pay ranges, MGT identified that several grades exceed the 75th percentile of market compensation data. To maintain competitiveness and fiscal responsibility, the FY 2026 compensation plan recommends:

- **Maintaining** existing range spreads (or very similar) for grades already above the 75th percentile.
- **Adjusting** ranges below the 75th percentile upward to meet this benchmark.

This strategy ensures that all pay grades are aligned with or exceed market standards, supporting both talent retention and attraction.

Table 1 consolidates all classification and compensation data, reflecting either the 75th percentile or current market rates. This comprehensive overview facilitates informed decision-making and strategic planning in compensation management.

Implementation and Administration of the Compensation Plan

Implementation of the Compensation Plan, as it affects individual employees, should be under the following pattern of adjustments:

1) Employees whose present compensation is below the minimum compensation of the range for their classification should be raised to the minimum of the range.
2) The compensation of employees whose present compensation is within the range for their classification should be slotted into the new Compensation Plan at their current pay rate.
3) The compensation of employees whose present compensation is above the maximum compensation of the range should be held at their present rate, without a reduction in compensation, until such time that further market analysis indicates commensurate alignment with the marketplace.
4) New hires in FY 2026 should be brought in at a step on the new Plan. Current employees will align with the new plan/steps when their step increase occurs.

Employee Advancement through the Ranges

To implement the new Compensation Plan, MGT recommends that the starting salary of the range (minimum) is the normal hiring/promoting rate. Exceptions to this starting point should be limited to hiring situations involving:

1) Applicants with exceptional background and qualifications.
2) A promotion in which the employee's current compensation is higher than the minimum of the new range.
3) In the case of a labor market situation where it is impossible to recruit qualified candidates at the minimum.

In these cases, employees may be appointed to their positions anywhere within the defined range (generally up to the midpoint), depending on their experience and qualifications, and based on the provisions of the Association's policies (if applicable). Employees should not be hired below the minimum of their compensation range.

Salary advancement between the hiring rate and the top-of-the-range (maximum) is done throughout the employee's tenure with the organization. Advancement through the range would be done on an annual basis and be dependent on a satisfactory performance evaluation. Incumbents progressing through the range should understand that standards of performance would become more exacting or controlling as compensation levels advance.

The Association may also wish to provide a merit bonus for exemplary performance after an employee reaches the maximum compensation for the range. MGT understands that this is something that the Association already does.

Again, it should also be noted that the implementation and use of a formal performance evaluation process for all staff members is a key component to the success of this Plan. Equally, if not more important, is that supervisors are adequately trained to perform the formal performance evaluation process.

FUTURE ADMINISTRATION OF THE COMPENSATION PLAN

To maintain competitive salary levels, there should be an annual review of the Association's salary ranges. The organizations used in the survey group for this Study have been determined to be comparable organizations to the Association. Therefore, ECIA can continue to use these organizations as a comparable market survey group for annual salary comparison purposes until it is determined that they should be reevaluated. It is MGT's recommendation that an annual survey of these organizations be conducted to determine the percentage increase each organization in the comparable group is granting, either as an annual across-the-board increase to their employees or as a general adjustment to their compensation ranges. The Association may wish to provide an across-the-board increase to all employees based on the information received from the comparable organizations. If this is the case, then the increases would be granted separately from any merit increase that would be awarded as a result of a successful performance evaluation.

It is the further recommendation of MGT that the compensation ranges for each grade be increased by the average percentage increase of the comparable group, even if an across-the-board increase is not given to all employees. Employees would continue to advance through the compensation ranges (provided that the employee is not at the maximum of the compensation range) by virtue of a merit increase granted for satisfactory or above-satisfactory performance of their job duties.

FUTURE ADMINISTRATION OF THE CLASSIFICATION PLAN

The administration of a Classification Plan is an ongoing process. It must be recognized that it is not static and is not intended to affix positions permanently into classifications. Instead, the Plan must be administered continually to adapt it to changing conditions.

Three (3) specific types of changes in the Plan itself are possible: elimination of a position, creation of a position, or a revision of a position.

1) When a position in a classification is eliminated or when a position has significantly changed work duties and responsibilities to the extent that the position becomes inappropriate or inaccurate, the position should be abolished.

2) New positions should be created when new work situations arise that are not covered by the established positions. However, caution should be exercised in this respect, particularly to ensure that new positions are justified, are not merely duplicating established positions, cannot be accommodated through changes in existing positions, and reflect substantially permanent rather than temporary situations.

3) The adjustment or revision of a position should be done when there are substantial changes to the requirements of the position or to the nature and complexities of the duties being performed. In this instance, a position may need to be re-scored and move up or down into a new classification.

All changes should be thoroughly evaluated in order to maintain the integrity of the classification relationships established in the Classification and Compensation Plan. Association Administration has been provided with the Job Analysis Questionnaire as well as the Job Factor Scoring Sheet, enabling the Association to grade a newly created or revised position. MGT provides scoring assistance in such cases in accordance with the Study contract.

Appreciation

MGT has appreciated the opportunity to work with the Association on this Classification and Compensation Study. A special thank you to the employees for all of the information provided to allow for the analysis and to the Administration for the significant amount of work and support dedicated to the project.

Position:	Skill Level	MGT Proposed Grade	CompAnalyst Market Data		75th Percentile Salary Survey Data		FY 2026 Salary Range		Proposed Salary Range		
	835 +	**15**									
Executive Director		**15**	173,900	258,300	134,696	179,595	153,000	182,778	**155,000**	**182,900**	Matched Current
	790 - 830	**14**									
No Positions in Grade		**14**	n/a	n/a	n/a	n/a	n/a	n/a	**140,000**	**165,200**	
	745 - 785	**13**									
Director of Housing & Support Services		**13**	95,000	124,000	117,117	156,156	129,356	153,764	**129,500**	**155,400**	Matched Current
Director of Transportation, Planning and Transit Svcs		**13**	141,400	170,700	91,829	129,726	129,356	153,764			
	700 - 740	**12**									
Director of Community and Economic Development		**12**	108,100	145,700	83,638	128,184	123,123	146,355	**123,000**	**147,600**	Matched Current
Director of Finance & Administration		**12**	170,900	230,800	84,638	130,684	111,544	132,590			
Director of HR & Program Development		**12**	153,500	197,700	103,306	146,229	123,123	146,355			
Director of Special Programs		**12**	166,800	199,200	n/a	n/a	123,123	146,355			
	655 - 695	**11**									
No Positions in Grade		**11**	n/a	n/a	n/a	n/a	n/a	n/a	**106,000**	**127,200**	
	610 - 650	**10**									
No Positions in Grade		**10**	n/a	n/a	n/a	n/a	n/a	n/a	**95,000**	**114,000**	
	565 - 605	**9**									
Senior Planner		**9**	83,100	103,900	68,643	89,996	84,783	103,585	**80,000**	**104,000**	Matched Current
(RTA) Transit Operations Manager		**9**	88,000	113,900	70,656	92,526	84,783	103,585			
	520 - 560	**8**									
No Positions in Grade		**8**	n/a	n/a	n/a	n/a	n/a	n/a	**75,000**	**101,250**	
	475 - 515	**7**									
Brownfields Coordinator		**7**	80,700	108,700	n/a	n/a	70,529	93,819	**70,000**	**94,500**	Matched Current
Grants and Municipal Coordinator		**7**	62,300	81,500	n/a	n/a	70,529	93,819			
Homeownership/Housing Development Specialist		**7**	n/a	n/a	55,346	75,464	74,329	96,184			
	430 - 470	**6**									
Building Inspector - Rehab Specialist		**6**	n/a	n/a	n/a	n/a	66,722	90,961	**63,000**	**88,200**	Matched Current
Community Development Coordinator		**6**	n/a	n/a	60,752	80,455	63,398	88,116			
Community Outreach and ED Coordinator		**6**	45,700	62,200	63,139	84,185	63,398	88,116			
Documentation Specialist		**6**	38,900	48,700	n/a	n/a	63,398	88,116			
Finance Accountant		**6**	55,500	67,200	56,412	80,000	63,398	88,116			
Finance and Documentation Specialist		**6**	58,200	68,400	61,201	86,295	63,398	88,116			
Grant Writer/Program Development		**6**	n/a	n/a	59,760	81,490	63,398	88,116			
Grants Specialist		**6**	62,000	89,300	59,241	78,988	66,722	90,961			
Housing and Grants Development Coordinator		**6**	n/a	n/a	61,425	81,901	63,398	88,116			
IT Program/Support Specialist		**6**	63,500	75,600	64,285	89,923	63,398	88,116			
Lead and Building Code Inspector		**6**	54,300	71,900	65,869	86,311	63,398	88,116			
Planner I		**6**	55,000	77,700	50,000	67,367	63,398	88,116			
Project Manager/Inspector		**6**	62,100	78,200	n/a	n/a	63,398	88,116			
Rehab Specialist/Building Code Inspector		**6**	43,100	59,800	n/a	n/a	63,398	88,116			
	385 - 425	**5**									
No Positions in Grade		**5**	n/a	n/a	n/a	n/a	n/a	n/a	**60,000**	**84,000**	
	340 - 380	**4**									
Administrative Services Manager		**4**	58,000	91,000	n/a	n/a	56,743	81,451	**58,500**	**81,900**	Matched Current
Family Support Specialist		**4**	37,100	48,500	n/a	n/a	56,743	81,451			
Finance/IT Coordinator		**4**	55,000	88,000	n/a	n/a	56,743	81,451			
Homeless Program Coordinator		**4**	n/a	n/a	n/a	n/a	56,743	81,451			
Housing Support Specialist		**4**	34,600	48,000	n/a	n/a	56,743	81,451			
	295 - 335	**3**									
Public Transit Dispatcher/Scheduler		**3**	40,300	51,100	43,658	54,996	51,038	74,329	**53,000**	**74,200**	Matched Current
	250 - 290	**2**									
Maintenance Manager		**2**	44,000	62,500	n/a	n/a	48,191	70,529	**50,500**	**70,700**	Matched Current
	Up to 245	**1**									
Receptionist		**1**	30,700	39,400	35,700	56,100	36,311	53,888	**40,000**	**56,000**	

Proposed Pay Ranges									$ Increase Between Steps	% Range Spread
Grade	Minimum- Step A	Step B	Step C	Step D	Step E	Step F	Step G	Maximum - Step H		
1	40,000	42,286	44,571	46,857	49,143	51,429	53,714	56,000	2,285.71	40%
2	50,500	53,386	56,271	59,157	62,043	64,929	67,814	70,700	2,885.71	40%
3	53,000	56,029	59,057	62,086	65,114	68,143	71,171	74,200	3,028.57	40%
4	58,500	61,843	65,186	68,529	71,871	75,214	78,557	81,900	3,342.86	40%
5	60,000	63,429	66,857	70,286	73,714	77,143	80,571	84,000	3,428.57	40%
6	63,000	66,600	70,200	73,800	77,400	81,000	84,600	88,200	3,600.00	40%
7	70,000	73,500	77,000	80,500	84,000	87,500	91,000	94,500	3,500.00	35%
8	75,000	78,750	82,500	86,250	90,000	93,750	97,500	101,250	3,750.00	35%
9	80,000	83,429	86,857	90,286	93,714	97,143	100,571	104,000	3,428.57	30%
10	95,000	97,714	100,429	103,143	105,857	108,571	111,286	114,000	2,714.29	20%
11	106,000	109,029	112,057	115,086	118,114	121,143	124,171	127,200	3,028.57	20%
12	123,000	126,514	130,029	133,543	137,057	140,571	144,086	147,600	3,514.29	20%
13	129,500	133,200	136,900	140,600	144,300	148,000	151,700	155,400	3,700.00	20%
14	140,000	143,600	147,200	150,800	154,400	158,000	161,600	165,200	3,600.00	18%
15	155,000	158,986	162,971	166,957	170,943	174,929	178,914	182,900	3,985.71	18%

APPENDIX A

EMPLOYEE JOB ANALYSIS QUESTIONNAIRE (JAQ)

ECIA

NAME:	DATE:
YEARS OF EXPERIENCE WITH EMPLOYER:	JOB TITLE:
YEARS OF EXPERIENCE ON THIS JOB:	YOUR JOB IS: FULL TIME ☐ PART TIME ☐
YOUR YEARS OF EXPERIENCE IN THIS FIELD:	DEPARTMENT:
NAME OF IMMEDIATE SUPERVISOR:	THEIR TITLE:

INSTRUCTIONS

The purpose of this questionnaire is to obtain additional information about your job that may not be included in your current job description. Please answer each question thoughtfully and frankly. After you have finished your portion of the questionnaire, give it to your immediate supervisor, who will complete their section.

General Summary: In three or four sentences, please summarize the major purpose or primary function of your job.

Please indicate if you have reviewed your current job description.

If you have any changes to your current job description, please mark them on the JD and attach it to this JAQ, or indicate changes here:

If you do not have a job description available to review, please list your job duties. Try to place your duties in order of importance and group "like" tasks together (e.g., "clerical duties including word processing, opening mail, filing, etc." or "front desk responsibilities including greeting visitors, answering telephones and routing calls, etc."). Job duties:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

14.

Feel free to add more numbers/duties if necessary.

FACTOR 1. Education & Training: In your opinion, what kind of education and training is necessary to perform your job?

- ☐ LEVEL 1: Level of knowledge that is below what is normally attained through high school graduation.
- ☐ LEVEL 2**:** High school diploma (GED) or equivalent.
- ☐ LEVEL 3: High school, plus elementary technical training, acquired on the job or through one year or less of technical or business school.
- ☐ LEVEL 4: Extensive technical or specialized training such as would be acquired by an Associate's Degree or two years of technical or business school.
- ☐ LEVEL 5: Completion of four-year college degree program.
- ☐ LEVEL 6: Additional professional level of education beyond a four-year college program, such as a CPA or Professional Engineer (P.E.) training.
- ☐ LEVEL 7: Completion of graduate coursework equal to a Master's Degree or higher.

What specific degree/coursework is NECESSARY?

What specific degree/coursework is PREFERRED?

If a specific certificate or license is mandated by an outside agency to perform your duties, name the certificate or license:

What special skills, knowledge, and abilities are required to perform your job? Please list:

FACTOR 2. Years of Experience: How much previous work experience do you feel is necessary to perform your job?

LEVEL 1:	LEVEL 2:	LEVEL 3:	LEVEL 4:	LEVEL 5:
☐ Less Than 1 Year	☐ 1 to 3 Years	☐ 4 to 6 Years	☐ 7 to 10 Years	☐ More than 10 Years

What is the minimum number of years required?

What specific experience is necessary?

FACTOR 3. Independent Judgment and Decision Making

Part 1: How much discretion do you have in making decisions with or without the input or direction of your supervisor?

- ☐ LITTLE: Little discretion or independent judgment exercised.
- ☐ SOME: Some discretion or judgment exercised, but supervisor is normally available.
- ☐ OFTEN: Job often requires making decisions in absence of specific policies and/or guidance from supervisors, but some direct guidance is received from supervisors.
- ☐ HIGH: High level of discretion with decisions restricted only by Departmental policies and little direct guidance from supervisors.
- ☐ VERY HIGH: Very high level of discretion with decisions only restricted by the broadest policies of the Organization.

Part 2: If you make an erroneous decision, what impact would this decision have on your work unit, department, and/or the Organization?

- ☐ MINOR: Some inconvenience and delays but minor costs in terms of time, money, or public/employee good will.
- ☐ MODERATE: Moderate costs in time, money, or public/employee good will would be incurred. Delays in important projects/schedules likely.
- ☐ SERIOUS: Important goals would not be achieved and the financial, employee, or public relations posture of the Organization would be seriously affected.
- ☐ CRITICAL: Critical goals and objectives of the Organization would be adversely and very seriously affected. Error could likely result in critical financial loss, property damage, or bodily harm/loss of life.

FACTOR 4. Responsibility for Policy Development: Does your job require you to participate in the development of policies for your unit/division/department/the Organization?

- ☐ LEVEL 1: Position involves only the execution of policies or use of existing procedures.
- ☐ LEVEL 2: May provide some input to supervisor when policies and procedures are updated.
- ☐ LEVEL 3: Position involves some development of policies/procedures for the Department and/or the interpretation or explanation of departmental policies for others in the organization or residents.
- ☐ LEVEL 4: Position involves significant or primary responsibility for the development of policies and procedures for a division or organizational component of a department, as well as the interpretation, execution and recommendation of changes to department policies.
- ☐ LEVEL 5: Position involves significant or primary responsibility for the development of policies and procedures for an entire department, plus occasional participation in the development of policies which affect other departments in the organization.
- ☐ LEVEL 6: Position involves the primary responsibility for the development of departmental policies and procedures and regular participation in the development of policies that affect other departments and occasionally involves participation in the development of organization-wide policies.

Give some examples of the types of policies you've written or been a part of creating:

FACTOR 5. Planning: How much latitude do you have to set your own daily work schedule and priorities for a given workday?

- ☐ LEVEL 1: Position requires that my daily work load and activities are assigned to me by my supervisor.
- ☐ LEVEL 2: Position requires that I plan my own daily work load and work independently according to established procedures or standards.
- ☐ LEVEL 3: Position requires that I plan my own daily work load and those of others in the department (first-level supervision).
- ☐ LEVEL 4: Position requires an above average ability to analyze data and develop departmental plans, including plans where a number of difficult, technical and/or administrative problems must be addressed (Manager/Division level planning).
- ☐ LEVEL 5: Position requires a high level of analytical ability to develop plans for a department or complex situation, including plans that involve integrating/involving/impacting other departments (Department Head level planning).

FACTOR 6. Contacts with Others: In the course of performing your job, what contacts with people in your department, other departments within the organization, and/or people from outside the organization are you required to make?

- ☐ LEVEL 1: Position involves interaction with fellow workers on routine matters with relatively little public contact.
- ☐ LEVEL 2: Position involves frequent internal and external contact, but generally on routine matters such as furnishing or obtaining information.
- ☐ LEVEL 3: Position involves frequent internal contact and regular contact with outsiders generally on routine matters, including contacts with irate outsiders which require some public relations skill for taking complaints for others to follow up upon.
- ☐ LEVEL 4: Position involves frequent internal and external contacts which require public relations skills in handling complaints. Contacts involve non-routine problems and require in-depth discussion and/or persuasion in order to resolve the problem. Handles more difficult contacts that are referred by front line employees.
- ☐ LEVEL 5: Position involves frequent internal and external contacts which require skill in dealing with, and influencing others, and initiating changes in policy/procedures to address the issue so as to avoid having to deal with the issue again in the future.
- ☐ LEVEL 6: Position involves frequent internal and external contacts in which I act as the spokesperson for the department and am authorized to make commitments of significant resources on behalf of the department.
- ☐ LEVEL 7: Position involves frequent internal and external contacts where I represent the entire organization and am authorized to make commitments in matters of broad or critical interest to the entire organization.

With which internal individuals or groups do you have the most contact?

With which external individuals or groups do you have the most contact?

FACTOR 7. Supervision Given:

Do you supervise or assign work to other employees? ☐ Yes ☐ No

If yes:

☐ LEVEL 1: Position is regularly responsible for assigning work to an employee or employees, without acting in a supervisory role. To whom does this position assign work?

☐ LEVEL 2: Position is responsible for the supervision of one full time or several part time employees.

☐ LEVEL 3: Position is responsible for the direct and/or indirect supervision of two to five full time (or full time equivalent) employees.

☐ LEVEL 4: Position is responsible for the direct and/or indirect supervision of six to 15 full time (or full time equivalent) employees.

☐ LEVEL 5: Position is responsible for direct and/or indirect supervision of 16 to 29 full time (or full time equivalent) employees.

☐ LEVEL 6: Position is responsible for direct and/or indirect supervision of 30 to 50 full time (or full time equivalent) employees.

☐ LEVEL 7: Position is responsible for direct and/or indirect supervision of more than 51 full time (or full time equivalent) employees.

Actual number of full-time (or full-time equivalent) employees supervised:

FACTOR 8. Physical Demands: Please describe any physical demands required to perform your job.

Demand	**No**	**Yes**	**How often? (Rarely, Occasionally or Daily)**
Lifting to 20 pounds	☐	☐	
Lifting 20-50 pounds	☐	☐	
Lifting 50+ pounds	☐	☐	
Climbing	☐	☐	
Walking	☐	☐	
Kneeling	☐	☐	
Crouching	☐	☐	
Crawling	☐	☐	
Bending	☐	☐	
Sitting	☐	☐	
Prolonged Standing	☐	☐	
Prolonged Visual Concentration	☐	☐	

Unpleasant or Hazardous Conditions: Please describe any unpleasant or hazardous conditions you are exposed to in performing your job and how often you are exposed to those conditions. Include only those conditions which are directly related to your work rather than specific work area conditions.

Condition	**No**	**Yes**	**How Often? (Rarely, Occasionally or Daily)**
Lighting-dimness or brightness	☐	☐	
Dust	☐	☐	
Heat	☐	☐	
Cold	☐	☐	
Odors	☐	☐	
Noise	☐	☐	
Vibration	☐	☐	
Wetness/Humidity	☐	☐	
Toxic Agents	☐	☐	

Electrical Currents	☐	☐
Heavy Machinery	☐	☐
Violence	☐	☐
Disease	☐	☐
Smoke	☐	☐
Other	☐	☐

FACTOR 9. Use of Technology/Specialized Equipment: Please check the level of technology or specialized equipment use needed for you to perform your job.

☐ LEVEL 1: Position has no responsibility for, or use of, technology.

☐ LEVEL 2: Position has some basic use of computers for data entry and some use of the telephone, copier, etc.

☐ LEVEL 3: Position has daily use of computers for data entry and use of the telephone, fax machine, copier, etc. Position has daily use of light equipment such as push mowers, weed whackers, pole saws, custodial equipment, etc.

☐ LEVEL 4: Position has daily use of computers, the Internet, Smartphones, etc. to create databases, spreadsheets, or reports. Position designs and creates customized reports, presentations, and/or documents using advanced software skills.

☐ LEVEL 5A: Position provides routine consultation and technology support for everyday computer programming and/or software requests/questions to others in the organization; is an applications super user; or uses specialized software such as GIS, SCADA or telecommunications software.

☐ LEVEL 5B: Position uses, troubleshoots, and/or repairs various pieces of specialized equipment such as HVAC, lighting, gas flares, blowers, engines, heavy equipment, diagnostic equipment, large vehicles (vacuum trucks, street sweepers, fire apparatus) and/or medical or public safety equipment.

☐ LEVEL 6: Position is responsible for advanced computer programming, system security, maintenance, training, and purchasing of items such as computers, printers, scanners, etc., for the computer system for the organization (IT personnel).

☐ LEVEL 7: Position is responsible for the overall direction and supervision of the staff that are responsible for the computer and technology needs of the organization, including responsibility for developing technology policies for the organization (IT personnel).

10. Comments/Additional Information: Feel free to add additional information below. If using a printed copy of this form, use the back of the form to add your comments.

Type your name and the date below, then save this form as a Word document with the file name of "JobTitle.LastName.FirstName" and email it to your supervisor. If using a printed copy of this form, sign and date it and then deliver to your supervisor.

EMPLOYEE'S SIGNATURE OR TYPED NAME ***DATE***

MGT USE ONLY:

THIS SECTION TO BE COMPLETED BY IMMEDIATE SUPERVISOR AND/OR DEPARTMENT HEAD

Please provide your comments below. If using a printed copy of the form and additional space is needed, please use the back of this form or attach an additional sheet. **Please do not mark in employee's portion of the questionnaire. The intent of this section is informational for MGT use only and not intended for distribution.**

1. Do you agree with the employee's answers to all of the above questions? If not, please explain.

2. List any job duties or assignments which the employee performs which are in addition to those listed on the job description or this form.

3. How long has this employee worked for you?

4. Additional comments from the employee's immediate supervisor:

Type your name and the date below, then email this form to your Department Head (if applicable) or to Administration. If using a printed copy of this form, sign and date it before forwarding.

_____ _____

SUPERVISOR'S SIGNATURE OR TYPED NAME ***DATE***

If Supervisor isn't Department Head, Department Head should review this form as well.

☐ I have read the above and substantially concur.
☐ I have read the above and have the following comments:

Type your name and the date below, and then email this form to the [ORG] Administration. If using a printed copy of this form, sign and date it before forwarding.

_____ _____

DEPARTMENT HEAD SIGNATURE OR TYPED NAME ***DATE***

IMPORTANT DATES:

February 12th – February 28th:
Employees complete and submit the JAQs to their Supervisors. Please save file as follows: JobTitle.LastName.FirstName.

February 28th – March 7th:
Supervisors and Department Heads review and then submit the JAQs to Human Resources.

March 7th – March 14th:
Human Resources collects and then submits the JAQs to MGT.

Week of March 24th:

MGT conducts virtual interviews with at least one employee in each position to expand upon the information shared in the JAQ.

Part D: References

A leader in public sector classification and compensation studies.

We feel repeat business is the greatest testament to our commitment to customer service and client satisfaction. We encourage you to contact any of our references to learn about the expertise and professionalism of our staff.

CITY OF DYERSVILLE, IOWA - CLASSIFICATION AND COMPENSATION STUDY

Mick J. Michel, City Administrator
340 1st Avenue East, Dyersville, IA 52040
563-875-7724 | mmichel@cityofdyersville.com

CITY OF INDIANOLA, IOWA - CLASSIFICATION AND COMPENSATION STUDY

Courtney Silliman, HR Director
110 North 1st Street, Indianola, IA 50125
515-961-9410 | csilliman@indianolaiowa.gov

CITY OF MARSHALLTOWN, IOWA - CLASSIFICATION AND COMPENSATION STUDY

Jill Petermeier Human Resources Director
24 North Center Street, 1st floor, Marshalltown, IA 50158
641-754-5704 | jpetermeier@marshalltown-ia.gov

Appendix A. Client List

The table below provides a sample list of MGT's classification and compensation clients.

Alabama		
Huntsville City Schools	University of Montevallo	University of North Alabama
Mobile Public Schools		
Arizona		
Maricopa County	Mesa Public Schools	Navajo Tribal Utility Authority
Maricopa County Sheriff's Office	Navajo Nation	
Alaska		
City of Seward		
California		
Alameda County Office of Education	City of San Gabriel	Mono County Office of Education
Antelope Valley College	City of San Jose	Oakland Housing Authority
Barstow Unified School District	City of Santa Maria	Orange County Dept. of Education
Bi-Valley Medical Clinic	City of Victorville	Paso Robles Joint Unified School District
Brawley Elementary School District	Chaffey College	Rim of the World Unified School District
California Department of Education	Cupertino Union School District	Sacramento City Unified School District
California Department of General Services	Fontana Unified School District	Sacramento County Management Association
California Postsecondary Education Commission	Gorman Learning Charter Network	Sacramento County Office of Education
California Student Aid Commission	Grossmont Unified School District	Solana Beach School District
Cajon Valley Union School District	Kings Community Action Organization	San Diego County Public Authority
Cupertino Union School District	Innovative Education Management	Stanislaus County Office of Education
City of Barstow	Isana Academies	Tuolumne County
City of Cudahy	Lake Elsinore Unified School District	Ukiah Unified School District
City of Culver City	Lawndale Elementary Schools	University of the Pacific
City of Hemet	Los Angeles Unified School District	Walnut Valley Unified School District
City of Placentia	Madera Unified School District	Yolo County Office of Education
City of Sacramento	Mendocino County Office of Education	
City of San Clemente	Menifee Union School District	
Colorado		
Arapahoe County	Poudre School District R-1	State of Colorado
Ouray County		State of Colorado Department of Human Services
Connecticut		
University of Connecticut	Town of Simsbury	Town of Avon
Town of Windsor	Town of Bloomfield	
Delaware		
Delaware Solid Waste Authority		
Florida		
Alachua County Board of Commissioners	Florida Bar Association	Hillsborough Area Regional Transit Authority
Alachua County Property Appraiser	Florida Chiropractic Association	Hillsborough Community College
Brevard County Sheriff's Office	Florida Department of Children and Families	Hillsborough County

Brevard Public Schools
Charlotte County Public Schools
Citizen's Property Insurance Corporation
Citrus County
Citrus County Clerk of the Court
Citrus County Mosquito Control District
Citrus County Property Appraiser
Citrus County Tax Collector
City of Apopka
City of Belle Glade
City of Boynton Beach
City of Casselberry
City of Fort Walton Beach
City of Gainesville
City of Gulf Port
City of Key West
City of Lake Mary
City of Lake Worth
City of Lakeland
City of Leesburg
City of Miami
City of North Port
City of St. Cloud
City of Tallahassee
City of Tamarac
City of Tampa
City of Titusville
Columbia County Property Appraiser County of Glades
Daytona Beach Community College
Disability Rights Florida
Florida Association of Court Clerks, Inc
Florida Atlantic University
Florida Department of Juvenile Justice
Florida Department of Management Services
Florida Department of Transportation
Florida Developmental Disabilities Council
Florida Education Association-United
Florida Gulf Coast University
Florida Gulf Health Systems Agency
Florida House of Representatives
Florida Job Corps
Florida Keys Community College
Florida League of Cities
Florida Lottery
Florida Office of Program Policy Analysis and Government Accountability
Florida Office of the Attorney General
Florida Ounce of Prevention Fund
Florida Polytechnic University
Florida School for the Deaf and Blind
Florida State Board of Administration
Florida State College at Jacksonville
Florida State University
Florida Tax Collectors Association
Florida Transportation Commission
Florida Virtual School
Glades County
Gulf Coast State College
Hillsborough County Tax Collector
Hillsborough Regional Transit Authority
Jackson County Tax Collector
Joint Underwriting Association
Leon County Property Appraiser
Leon County Tax Collector
Marion County Emergency Medical Services Alliance
Nassau County Property Appraiser
New College of Florida
Okaloosa County Schools
Palm Harbor Special Fire Control and Rescue District
Pensacola Area Housing Commission
Santa Fe College
School Board of Brevard County
Solid Waste Authority of Palm Beach County
Southwest Florida Water Management District
St. Johns County Property Appraiser
State College of Florida - Manatee-Sarasota
Sunshine 811
Tampa Bay Water
Tampa Hillsborough Expressway Authority
Tampa Housing Authority
Tampa Sports Authority
Town of Davie
University of Central Florida
Workforce Plus, Tallahassee

Georgia

Board of Regents of the University System of Georgia
City of Albany/Dougherty County Board of Commissioners
City of Macon
City of Richmond Hill
City of Stonecrest
Dalton State College
Darton College
Fayette County
Georgia College and State University
Georgia Health Sciences University
Georgia Southern University
Gwinnett County Public School System
Gwinnett County Public Library
Henry County School District
Kennesaw State University
Southern Polytechnic State University
United States Treasury Customs Service
Valdosta State University

Hawaii

Hawaii Health Systems Corporation
University of Hawaii System
Maui County

Idaho

Nez Perce Tribe

Illinois		
Illinois Board of Higher Education	Lake County	Rockford Board of Education
Kankakee County	Village of Oak Park	Sangamon County
Village of Fox Lake	Village of Norridge	Village of Gurnee
City of St. Charles	City of Geneva	Henry County
Village of Plainfield	Elmhurst Park District	Park District of Highland Park
Village of Vernon Hills	Village of Lincolnwood	City of East Moline
Village of Montgomery	Village of Bensenville	Urbana Park District
Village of Lisle	Village of Berkeley	Oswegoland Park District
City of Countryside	City of Princeton	City of Clinton
Village of Deer Park	Village of Round Lake	Village of Channahon
Fox River Water Reclamation District	DeKalb County Health Department	Northern Suburban Special Recreation Association
Village of Coal City	Village of New Lenox	City of Lockport
Village of Elburn	City of Rochelle	City of Sterling
Champaign Park District	Maine Township	
Iowa		
Iowa Central Community College	Kirkwood Community College	Northeast Iowa Community College
Iowa Valley Community College District	City of Indianola	City of Dyersville
	City of Marshalltown	City of Burlington
Kansas		
Lawrence Douglas Housing Authority		
Louisiana		
City of Baton Rouge	Parish of East Baton Rouge Recreation and Park Commission	Port of Iberia
Maine		
University of Maine – Orono		
Maryland		
Baltimore City Community College	Community College of Baltimore County	Maryland Environmental Service
Baltimore County Public Schools	Hartford County Public Schools	Montgomery College
Massachusetts		
Cape Cod Mosquito Control Project	Town of Boxford	Town of Millbury
Children's Trust	Town of Burlington	Town of Needham
City of Attleboro	Town of Charlton	Town of North Andover
City of New Bedford	Town of Danvers	Town of Norton
City of Beverly	Town of Dartmouth	Town of Norwood
City of Cambridge	Town of Dedham	Town of Plymouth
City of Framingham	Town of Duxbury	Town of Provincetown
City of Gardner	Town of Eastham	Town of Reading
City of Marlborough	Town of Easton	Town of Shrewsbury
City of Somerville	Town of Falmouth	Town of Southborough
City of Watertown	Town of Franklin	Town of Sturbridge
Lynn Public Schools	Town of Hingham	Town of Topsfield
Norfolk County Mosquito Control District	Town of Lakeville	Town of Truro
North Andover Public Schools	Town of Littleton	Town of Upton
Town of Abington	Town of Lexington	Town of Walpole
Town of Amherst	Town of Manchester-by-the-Sea	Town of Wayland
Town of Brookline	Town of Marblehead	Town of Wenham
Town of Boylston	Town of Marion	Town of Westborough
	Town of Maynard	Town of Weston
	Town of Middleton	Town of Westport

Town of Boxborough	Town of Milford	Town of Williamstown
	Town of Millis	Worcester Public Library
Michigan		
Central Michigan University	DeWitt Charter Township	Livingston Community Health Authority
City of Allegan	Dickinson County	
City of Coldwater	Gogebic County	Menominee County
City of Ferndale	Ingham County	Muskegon County
City of Grand Rapids	Kent County	Sault Tribe of Chippewa Indians
City of Muskegon	Lapeer County	St. Clair County
City of Rochester	Lenawee County	West Shore Community College
City of Niles	Livingston County	
Clinton and Montcalm County Road Commission		
Minnesota		
Minnesota State University System	City of Woodbury	City of Stillwater
	City of Breezy Point	Northeastern Minnesotans for Wilderness (Save the Boundary Waters)
Missouri		
City of Columbia	Southeast Missouri State University	St. Louis Community College
East Central College		City of Rock Hill
New Jersey		
The Richard Stockton College of New Jersey		
New York		
Corning Community College	SUNY - Clinton Community College	
Nevada		
Southern Nevada Regional Housing Authority		
North Carolina		
Chapel Hill-Carrboro Schools	Mayland Community College	Pitt Community College
Chatham County	North Carolina Association of County Commissioners	Town of Maiden
City of Canton		Town of West Jefferson
City of Waynesville	North Carolina Community College System	University of North Carolina
Davidson County Personnel Department	North Carolina Education Lottery	Wake County Personnel Department
Haywood County	Piedmont Community College	Wake County Public Schools
Oklahoma		
Cherokee Nation Enterprises	City of Oklahoma City	Oklahoma County
Oregon		
City of Hermiston	Klamath County	Oregon University System
City of Hillsboro	Oregon Institute of Technology	Prosper Portland
Jackson County		
Pennsylvania		
Centre Area Transportation Authority	Community College of Allegheny County	Lancaster County
		Pittsburgh Public Schools
Township of Doylestown	Upper Gwynedd Township	Western PA School for the Deaf
Rhode Island		
Roger Williams University	Rhode Island Housing Authority	Rhode Island Student Loan Authority
South Carolina		
Anderson County School District 5	City of Newberry	Oconee County
	City of Simpsonville	Oconee County Public Schools
Anderson Regional Joint Water System	County of Lancaster	Pickens County
	Dillon County	Richland County

APPENDIX A. CLIENT LIST

Beaufort County School District	Dorchester County	River Banks Zoo
Bonita Springs Fire Control and Rescue District	Dorchester County Library	South Carolina Department of Public Safety
Chester Metropolitan District	Greenville County Recreation District	South Carolina Education Lottery
City of Anderson	Greenwood Metropolitan Sewer	Town of Hampton
City of Bluffton	Hampton County	Western Carolina Regional Sewer Authority
City of Cayce	Jasper County	York County
City of Easley	Lancaster County	York County Library
City of Florence	Midlands Technical College	York Electric Cooperative, Inc.
City of Gaffney	Municipal Association of South Carolina	
City of Georgetown		
City of Lancaster		
Tennessee		
City of Kingsport	Memphis City Schools	
Texas		
Austin Independent School District	City of Longview	Texas A&M University – Texarkana
Bastrop County	City of San Antonio	Texas A&M University System
Burnet County	Dallas Area Rapid Transit	Texas Southmost College
City of Brownsville	Dallas Independent School District	Texas State Technical College
City of Corpus Christi	Galveston County	Travis County
City of La Porte	Kerr County	University of North Texas System
	Texas A&M University – Kingsville	
Vermont		
Southwest Vermont Supervisory Union	City of Essex Junction	Town of Richmond
	Town of Hartford	
Virginia		
Albemarle County	City of Portsmouth	Tidewater Community College
City of Chesapeake	City of Richmond	Virginia Commonwealth University
City of Newport News	Fairfax County Public Schools	
	K12 Inc. (Stride)	Virginia State University
Washington		
City of Woodinville	Grays Harbor County	Washington State Board for Community and Technical Colleges
Clark College	Green River College	
Wisconsin		
Village of McFarland	Sun Prairie	City of Monona
Village of Windsor	Port Washington	Village of Lisbon
City of Beaver Dam	Dane County Cities and Villages Association	

Paypoint HR

Classification and Compensation Study
City of Independence, Iowa

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

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A. Transmittal Letter

Dear Sir or Madam,

Paypoint HR, LLC is submitting a proposal in response to the City of Independence's request for a comprehensive Classification and Compensation Study aimed at positioning the City as an employer of choice. Our study will objectively assess job roles, organizational hierarchy, and external market pay ranges for approximately 55 unique job titles, providing data-driven recommendations for adjustments. The study will be completed within 16-20 weeks and will incorporate quantitative evaluations to support informed decision-making on compensation and benefits.

Our methodology emphasizes collaboration with clients and employees to develop practical, actionable recommendations and ensure their successful implementation. Paypoint HR recognizes that employees are the City's most valuable asset, and by including their input, we help foster a workplace culture where they feel valued and engaged in public service.

We rigorously test our recommendations to ensure they align with sound business practices and provide a structured framework for recruitment, retention, and compensation management. Our goal is to equip the City with a sustainable and competitive compensation strategy that supports long-term success in attracting and retaining top talent. Specifically, we have developed an approach and methodology that incorporates the following:

- Market competitiveness.
- Recognition that compensation is comprised of more than just base pay levels.
- Consideration of changes in recent compensation trends and strategies.
- Customization of solutions that consider the diversity of needs present within the Client's organization and allows the Client to select the components and options that best meet their overall needs.

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

Sincerely,

Karin VM Campbell

Karin VM Campbell, CEO

B. Firm Experience and Qualifications

Paypoint HR is a cost-effective, innovative firm specializing in classification and compensation solutions for the public sector. Founded in Maryland, our main office is located in Davidsonville, with an additional office in Manteo, North Carolina. As an independent Woman-Owned Small Business (WOSB), we have been helping public organizations develop internally equitable and externally competitive pay plans since 2015.

Our unique approach integrates expertise from diverse fields, including organizational design, compliance, research analytics, business strategy, and human resources. By leveraging this multidisciplinary expertise, we collaborate with clients to develop strategic, customized classification and compensation plans that enhance their ability to recruit and retain top talent. We believe our firm stands apart by uniting specialists from multiple disciplines to provide tailored solutions that give our clients a competitive edge in their labor markets.

Paypoint HR's team consists of recognized experts in human resource management who understand that compensation management is not a "one-size-fits-all" approach. While we adhere to established standards, our analysis is more thorough than our competitors, incorporating both standard pay calculations and customized reports tailored to client needs. We develop compliant job descriptions and pay plans based on the latest regulations, reducing grievances and enhancing equity. Our recommendations also consider the business and operational needs of organizations.

With decades of experience providing total compensation solutions to the public sector, Paypoint HR has the executive staff and resources ready to deliver exceptional service. Our response to the Statement of Work details our business history, personnel, and processes, demonstrating our ability to meet the city's needs.

We are active members of WorldatWork and the Society for Human Resource Management, continuously staying updated on emerging trends and best practices. Our personnel have presented at industry associations, financial organizations, and universities and serve on various boards. We conduct custom external market surveys and leverage industry data, including recent survey reports, regulatory updates, and labor market trends. We welcome client input on preferred survey sources and believe our expertise, proprietary software, and extensive data resources set us apart from other contractors, ensuring the successful achievement of project goals.

Our current workload allows us to commit the necessary staff members to the successful completion of the project. We welcome the active participation of the project team throughout the entire study but understand that they will be engaged with other priorities as well. Paypoint HR expects support from the client in communication with key staff, setting up meetings, providing meeting resources, as well as establishing reporting relationships, milestones, and timelines.

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

Project Manager – Primary Contact
Karin Campbell, SPHR, SHRM-SCP
695 Santa Maria Lane
Davidsonville, MD 21035
Karin@PaypointHR.com
(443) 336-4272

Technical Director – Secondary Contact
Dr. Rick Campbell, CCP
695 Santa Maria Lane
Davidsonville, MD 21035
Rick@PaypointHR.com
(540) 815-7837

Principals

Karin Campbell, CEO & Project Manager

Master of Business Administration, University of Texas
Bachelor of Science in Business Marketing, University of Maryland
SPHR, SHRM-SCP, IPMA-SCP

PROFILE

Strategic and accomplished Human Resources executive with over two decades of experience in leading classification and compensation studies, organizational consulting, and HR operations for public sector and nonprofit institutions. Demonstrated expertise in project management, stakeholder engagement, labor market research, compensation strategy, and HR compliance. Proven ability to lead large-scale initiatives that improve organizational performance, ensure legal defensibility, and support equity and retention.

CORE COMPETENCIES

- Public Sector HR Consulting
- Classification & Compensation Studies
- Market Pay Analysis & Survey Design
- Strategic Planning & Implementation
- Labor Relations & Workforce Analysis
- Employee Communications & Change Management
- Total Rewards & Benefits Analysis
- Executive Reporting & Presentation
- Team Leadership & Development
- Quality Assurance & Risk Mitigation

Dr. Rick Campbell, President & Director of Research

Ph.D. in Engineering Science and Mechanics, Penn State University
Bachelor of Science in Applied Mathematics, University of Virginia
Certified Compensation Professional (CCP), WorldatWork

PROFILE

Experienced executive and classification & compensation strategist with a Ph.D. in Engineering Science and over 25 years of experience across aerospace, energy, and public sector HR consulting. Founder of Paypoint HR, specializing in classification and compensation studies for municipalities, sales compensation for businesses, and the development of advanced SaaS tools. Skilled in quantitative analysis, leadership communication, stakeholder engagement, and systems implementation.

CORE COMPETENCIES

- Classification & Compensation Studies
- Executive Communication & Public Engagement
- Project Management & Implementation
- Research Design & Statistical Analysis
- Technical Writing & Presentation
- SaaS Development & Application
- Public Sector Consulting
- Team Leadership & Training
- Quality Assurance & Risk Mitigation
- Salary Survey & Market Analysis
- Fair Labor Standards Act Analysis

Additional Project Personnel

LTC (Ret) Narrie Magturo, Director of Quality

Master of Science in Environmental Management, Webster University
Master of Science in Environmental Science, Purdue University
Bachelor of Arts in Biology, Capital University
American Red Cross Disaster Response Team.

PROFILE

Results-driven Director of Quality Assurance with more than 15 years of experience in compliance auditing, risk mitigation, and quality control across military and HR consulting environments. Retired U.S. Army officer with over 22 years of distinguished service, now applying military-grade QA/QC methodologies to public sector classification and compensation projects. Skilled in developing, implementing, and evaluating quality assurance processes that support equity, legal compliance, and strategic HR outcomes.

CORE COMPETENCIES

- Quality Assurance & Control (QA/QC)
- HR Compliance Audits & Standards
- Public Sector Risk Management
- ISO 9001 & Regulatory Compliance
- Environmental, Health & Safety Oversight
- Stakeholder Engagement & Communication
- Emergency Response Planning (NIMS/FEMA)
- Program & Project Management
- Training & Technical Documentation
- Vulnerability & Infrastructure Assessment

Jenna Hurdle, Project Associate

Bachelor of Arts in Criminal Justice, High Point University

PROFILE

Experienced Project Associate with over 15 years in the legal field and more than 2 years supporting classification and compensation projects at Paypoint HR. Brings expertise in legal compliance, document review, data quality, and administrative support. Strong background in criminal justice, real estate, and insurance. Recognized for meticulous research, regulatory compliance, and efficient coordination of project tasks and data preparation.

CORE COMPETENCIES

- Project Coordination & Administrative Support
- Benefit Analysis
- Legal & Regulatory Compliance
- Document Review & Management
- Preliminary Data Analysis
- Research & Quality Control
- Classification & Compensation Project Support
- Client Communications & Service
- Legal Procedures & Filing Systems
- Cross-Industry Experience
- Confidential Records Management

Jennifer Holcomb, Quality Specialist

Bachelor of Science in Health Sciences, San Diego State University
Associate Degree in Nursing, Mira Costa College

PROFILE

Detail-oriented Quality Assurance Specialist with over 7 years of experience supporting classification and compensation projects for public sector clients. Brings a background in health sciences and nursing to her analytical and structured approach. Highly experienced in job evaluation, market survey coordination, and documentation review. Known for precision, follow-through, and effective collaboration in multidisciplinary project teams.

CORE COMPETENCIES

- Job Evaluation & Classification Support
- External Market Survey Coordination
- Job Description Analysis
- Quality Assurance & Audit Review
- Report Design & Documentation
- Project Coordination & Milestone Tracking
- Data Verification & Benchmarking
- Public Sector HR Consulting
- Communication of Technical Concepts
- Cross-Functional Team Collaboration

Erin Martell, Technical Writer

Master of Science in Criminal Justice, , Northeastern University
Bachelor of Arts in Liberal Arts, St. John's College

PROFILE

Experienced technical writer and project team collaborator with 17 years of experience supporting public sector and nonprofit initiatives. Brings over eight years of experience working with Paypoint HR on classification and compensation projects, where she contributes precise technical documentation and quality assurance deliverables. Proven success in developing systems to ensure contract and grant compliance, analyzing data for program effectiveness, and improving project communications and deliverables.

CORE COMPETENCIES

- Technical Writing & Editing
- Public Sector Contract Compliance

- Grants Management & Reporting
- Survey Development & Analysis
- Project Documentation & Quality Control
- Communication Systems Development
- Operations Management
- Stakeholder Reporting & Deliverables

Recent Studies

Organization	Project Title and Service Dates
Accomack County, Virginia	Classification & Compensation Study 2023
City of Alton, Illinois	Compensation Study 2025
City of Bath, Maine	Compensation Study 2021 – 2022
Town of Berlin, Maryland	Wage Compensation and Classification Study 2022 – 2023
City of Bellaire, Texas	Classification Study and Total Compensation Study 2023 – 2024
Belknap County, New Hampshire	Pay and Classification Audit – Consultation Services 2021 – 2022
City of Broken Arrow, Oklahoma	Classification Study 2024 – 2025
City of Brooklyn Center, Minnesota	Peer Market Survey and Job Salary Analysis 2024 – 2025
Town of Centreville, Maryland	Classification and Compensation Study 2024 – 2025
City of College Park, Maryland	Job Classification and Compensation Study 2023 – 2024
City of Columbia, Missouri	Classification and Compensation Data Consultation Services 2018 – 2022
City of Concord, New Hampshire	Classification and Compensation Study 2024 – 2025

City of Cottage Grove, Minnesota	Position Classification and Compensation System 2020 – 2025
City of Delray Beach, Florida	Compensation and Classification Study 2024
Town of Derry, New Hampshire	Consulting Services for Classification and Compensation 2023 – 2024
City of Des Peres, Missouri	Comprehensive Compensation Study 2024
Town of Elizabeth, Colorado	Compensation Study and Pay Equity Analysis 2025
Elko County, Nevada	Compensation and Classification Study 2019 – 2021
Town of Enfield, New Hampshire	Classification and Compensation Study 2023
Eureka County, Nevada	Compensation and Classification Study 2023 - 2025
City of Farmington, Missouri	Comprehensive Compensation Study 2025
City of Fort Morgan, Colorado	Compensation Study & Analysis 2022 – 2023
Town of Frederick, Colorado	Classification and Compensation Study 2023 – 2024
Town of Front Royal, Virginia	Compensation and Classification Study 2016 – 2018, 2022, 2023
Town of Goffstown, New Hampshire	Classification and Compensation Study 2023
Gratiot County, Michigan	Classification and Compensation Study 2022 – 2023
City of Green Cove Springs, Florida	Comprehensive Classification and Compensation Study 2024
City of Hagerstown, Maryland	Compensation and Classification Analysis 2023 – 2024
Town of Highland Park, Texas	Compensation/Benefit Study 2025

Village of Indiantown, Florida	Compensation and Classification Study 2025
Islamorada, Village of Islands, Florida	Compensation Classification and Job Study 2025
City of Jacksonville, Texas	Compensation and Classification Study 2021 – 2022
Jefferson County, Missouri	Salary and Classification Study 2025
Kent County, Delaware	Compensation & Classification Study 2022 – 2023
Knox County, Illinois	Classification & Compensation Study 2019 – 2025
Town of La Plata, Maryland	Organizational Design Study 2021 Classification and Compensation Study 2022
City of Lake City, Florida	Classification and Compensation Study 2022
City of Largo, Florida	Compensation & Classification Study 2019 – 2020, 2022, 2023 – 2024
City of Leander, Texas	Citywide Compensation Study 2022
City of Melbourne, Florida	Compensation and Class Study 2025
Merrimack County, New Hampshire	Pay and Classification Study – Consulting Services 2023
Miami-Dade County, Florida	Position and Compensation Study 2024 – 2025
Millard County, Utah	Salary Survey and Compensation Analysis Services 2021 – 2022
City of Muscatine, Iowa	Compensation Study 2023
City of Newberry, Florida	Employee Classification & Compensation Study 2023
Town of North Beach, Maryland	Wage Compensation and Classification Study 2023 – 2024

Town of North East, Maryland	Comprehensive Compensation Study and Classification Plan Development 2025
Nye County, Nevada	Classification & Compensation Study and Analysis 2025
City of Odessa, Missouri	Job Analysis and Compensation Study 2025
City of Portland, Tennessee	Compensation Study 2024
City of Raytown, Missouri	Compensation and Classification Plan 2021 - 2023
Rockingham County, New Hampshire	Pay and Classification Audit 2021
Village of Scarsdale, New York	Compensation and Classification Study 2023 – 2024
City of Seabrook, Texas	Job Analysis & Evaluation 2023
City of South Portland, Maine	Compensation Plan Study 2019 – 2020; 2024
Southampton County, Virginia	Compensation and Classification Study 2025 – 2026
City of St Pete Beach, Florida	Compensation Study 2023 – 2024
City of Stuart, Florida	Classification and Compensation Study 2019, 2024
Town of Sunapee, New Hampshire	Classification and Compensation Study 2024
City of Tomball, Texas	Classification and Compensation Study 2023
Town of Tonopah, Nevada	Compensation and Benefit Study 2025
City of Villa Rica, Georgia	Compensation Study 2023

C. Project Approach and Work Plan

Assessment of Needs

Paypoint HR has done a preliminary review of possible hurdles specific to the City of Independence's ability to attract, motivate, and retain employees. Furthermore, our project history has familiarized us with projects similar in size, scope, and services. You can feel confident our approach is time tested.

Our understanding of the project is that Independence is a full-service city that provides both its residents and tourists with a full range of municipal services including but not limited to police, fire, streets and utilities, and parks and recreation. The city desires to update their current compensation plan to keep up with current compensation practices. The purpose is to attract and retain a high performing and engaged workforce that will continue providing excellent service to those who live in the city.

Possible Challenges

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

- Increase in community demands and expectations for service offerings paired with limited resources to quickly adapt,
- Difficulty recruiting qualified individuals for certain positions,
- Job roles have changed due to changing technology, increased regulations, etc.,
- Increasing cost of employee benefits,
- Pay compression, external inequity, and perception of internal inequities, and
- A highly competitive labor market with other public and private employers in the region competing for the same labor force.

These obstacles are independently problematic and collectively require a change from a tactical management style to a strategic management philosophy. We believe developing a long-term strategy for recruiting and retaining employees is the true intent of this RFP. Paypoint HR understands we will be working with an appointed team leader, key leadership staff, and stakeholders (Project Team) to validate the scope of services, methodology, timelines, and other deliverables. We anticipate several virtual meetings, but we remain flexible to meet your needs. We are planning that meetings will be used to kick-off the project, employee briefing sessions, and presentation of the findings of the study.

Methodology

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

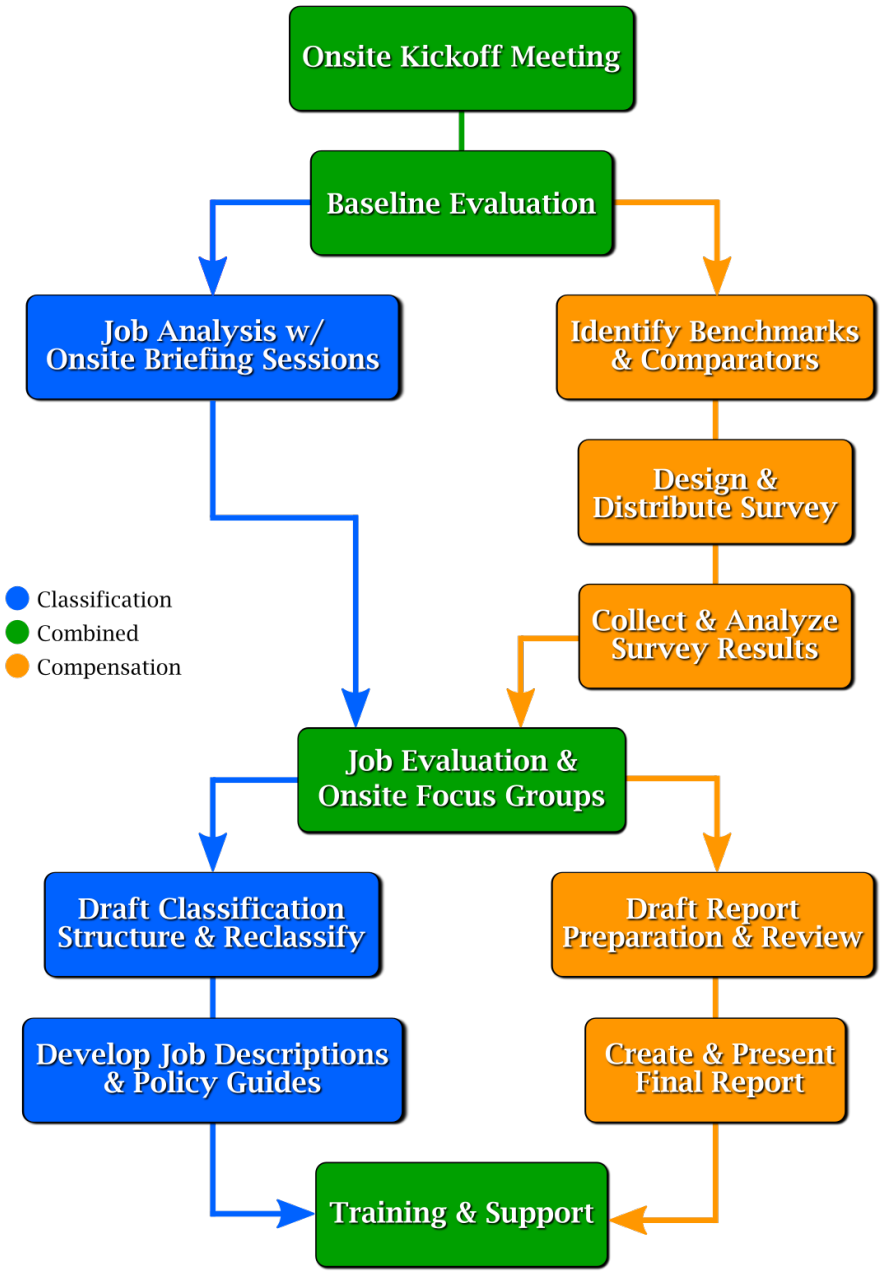


Figure 1 – Process Flow Chart

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

- Job titles and job descriptions are, in the minds of the employees and their supervisors, inextricably associated with the "worth of the work" or pay. Compensation is often a highly emotional issue. By separating the two phases of the study, even though elements of the phases may be conducted concurrently, it gives us two separate yardsticks of measure.

- The compensation review will be completed when there is a full understanding of the scope of work, thereby ensuring that the data developed from the labor market and client's classifications are correct.

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

Phase 1 – Classification/Competencies Component

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

Phase 2 – Compensation Component

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

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

Phase 1 Classification/Competencies Component

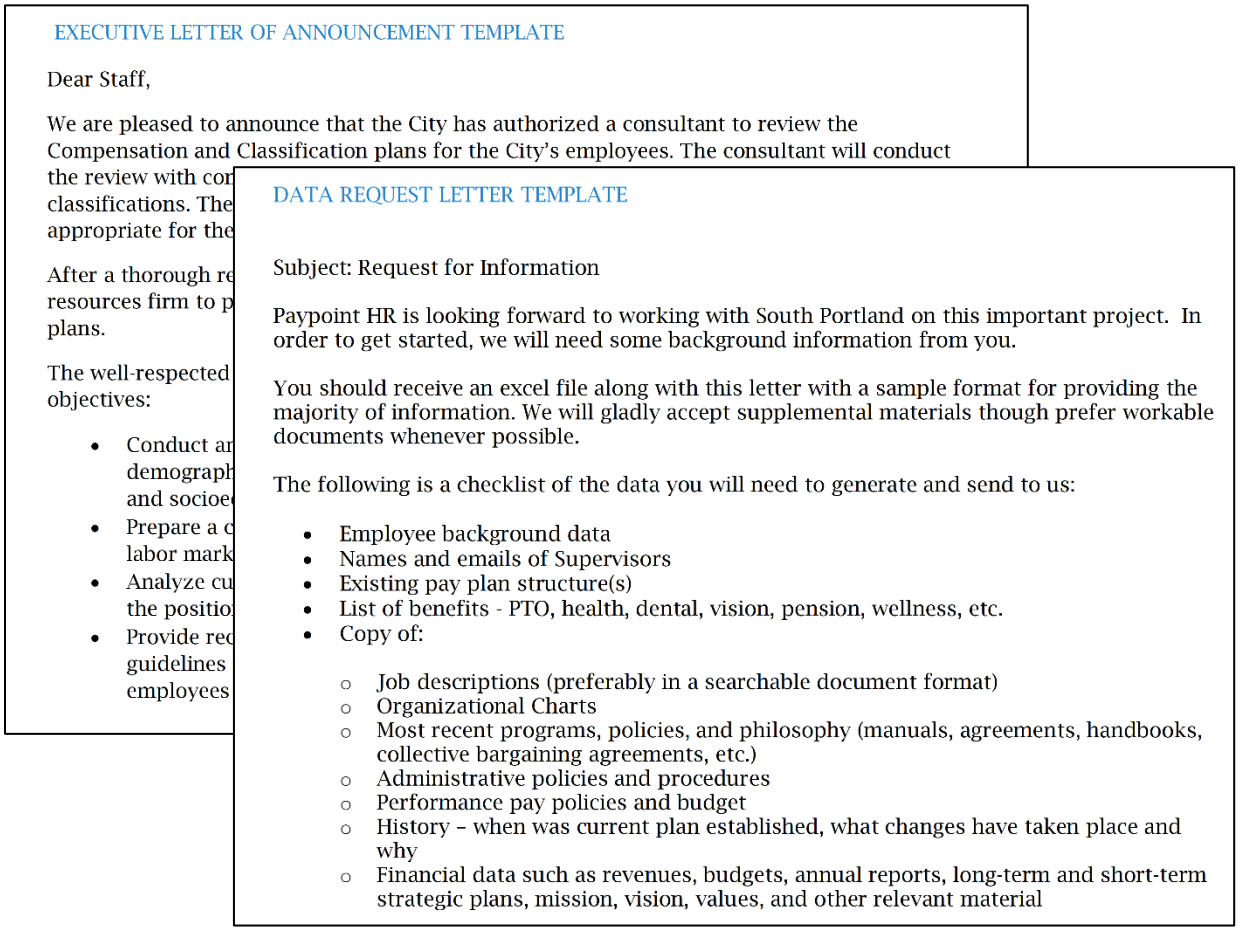
This phase of the assignment will result in the study of all classes that includes the comparison of classes within series and to other occupational levels within the organization. Study tasks include project initiation and orientation, employee orientations, creation of custom surveys for employees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

Task 1A – Project Start

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

Kick-Off Activities

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



EXECUTIVE LETTER OF ANNOUNCEMENT TEMPLATE

Dear Staff,

We are pleased to announce that the City has authorized a consultant to review the Compensation and Classification plans for the City's employees. The consultant will conduct the review with cor
classifications. The
appropriate for the

After a thorough re
resources firm to p
plans.

The well-respected
objectives:

- Conduct ar
demograph
and socioe
- Prepare a c
labor mark
- Analyze cu
the positio
- Provide rec
guidelines
employees

DATA REQUEST LETTER TEMPLATE

Subject: Request for Information

Paypoint HR is looking forward to working with South Portland on this important project. In order to get started, we will need some background information from you.

You should receive an excel file along with this letter with a sample format for providing the majority of information. We will gladly accept supplemental materials though prefer workable documents whenever possible.

The following is a checklist of the data you will need to generate and send to us:

- Employee background data
- Names and emails of Supervisors
- Existing pay plan structure(s)
- List of benefits - PTO, health, dental, vision, pension, wellness, etc.
- Copy of:
  - Job descriptions (preferably in a searchable document format)
  - Organizational Charts
  - Most recent programs, policies, and philosophy (manuals, agreements, handbooks, collective bargaining agreements, etc.)
  - Administrative policies and procedures
  - Performance pay policies and budget
  - History – when was current plan established, what changes have taken place and why
  - Financial data such as revenues, budgets, annual reports, long-term and short-term strategic plans, mission, vision, values, and other relevant material

Figure 2 - Sample Letter Templates

Task 1B – Baseline Evaluation

Paypoint HR will incorporate the accumulated knowledge and understanding of the project gathered at this point into a main client file. Data will be collected throughout the project and will be housed in this central location. The Baseline Evaluation Task evaluates the current system as outlined and includes the following activities:

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

- Conduct a thorough review of all background materials related to the client's classification system. Review information from the department head as well as incumbents. Conduct interviews as appropriate.
- Document accepted compensation and classification philosophy and budgets based on input from the Study Project Leaders and other key staff.
- Gain understanding of employee recruiting and retention processes to uncover challenges in the local labor market and provide guidance on market positioning strategies.
- Once a baseline is determined, establish the client's current position as compared to the local market using sources of data preferred by the client as well as Paypoint HR's resource library for consideration.
- Look at goals for recruiting and retention with regards to sustainable budget amounts that will support recommendations on market position strategy.
- Consider both current and anticipated information technology programs, software and staffing levels to support, implement, administer, and maintain the recommendations given to the client by Paypoint HR.

Current Grade	Staff #	# near Min	% near Min	# near Max	% near Max
110	19	3	15.8%	1	5.3%
111	**43**	**10**	**23.3%**	5	11.6%
112	16	2	12.5%	1	6.3%
113	35	5	14.3%	6	17.1%
114	17	2	11.8%	2	11.8%
115	13	0	0.0%	0	0.0%
116	31	1	3.2%	2	6.5%
117	2	0	0.0%	0	0.0%
118	26	1	3.8%	4	15.4%

Figure 3 – Sample Baseline Evaluation

Task 1C – Job Analysis Collection and Completion

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

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

- Conduct employee briefing sessions to review the role of employees, the role of supervisors, the scope of work to be covered by the study and to explain how to complete the job analysis questionnaire (Position Vantage Point, or PVP.) It is communicated to employees that this process is not a performance review, but rather an identification of what should be required for new employees.
- Employees will be given a period to complete the PVP, usually 10 – 14 days. Employees are encouraged to retain a copy of their responses for their records.
- Completed surveys are given to department heads for their review and input. Front line supervisors often work in collaboration with department heads during this process. Typically, this process takes 7 – 10 days.
- Department heads turn in the reviewed PVPs to Human Resources for any further input with the final product then provided to Paypoint HR for analysis.

Task 1D – Job Evaluation and Classification Development

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

- Facilitate collection of job descriptions, desk audits, and supporting materials from the Study Project Leaders or designated Human Resource department contact. The job descriptions, audits, and supporting reports will be reviewed and analyzed in detail along with other documentation to obtain an understanding of the duties and responsibilities assigned to each position.
- Identify the classification of existing positions utilizing the existing job evaluation system, review jobs, and characterize the internal equity relationships within the organization.
- Review all class specifications with the Study Project Leaders. Review each classification and score the classification using a point factor system or the system that the client has in place. Include an evaluation of results.
- Develop preliminary recommendations for the classification structure. The classification system designed at this point will be based solely on internal equity relationships and will be guided by scores for each classification. Essentially, a structure of classifications will be reviewed and classifications with similar scoring would be grouped into pay grades. The final decision on the minimums and maximums of the pay grades will be determined after the market data has been collected.

Evaluation Factors

- Education / Experience / Certifications
- Duties
- Complexity
- Independence
- Impact and Accountability
- Supervision and Authority
- Interaction
- Environment

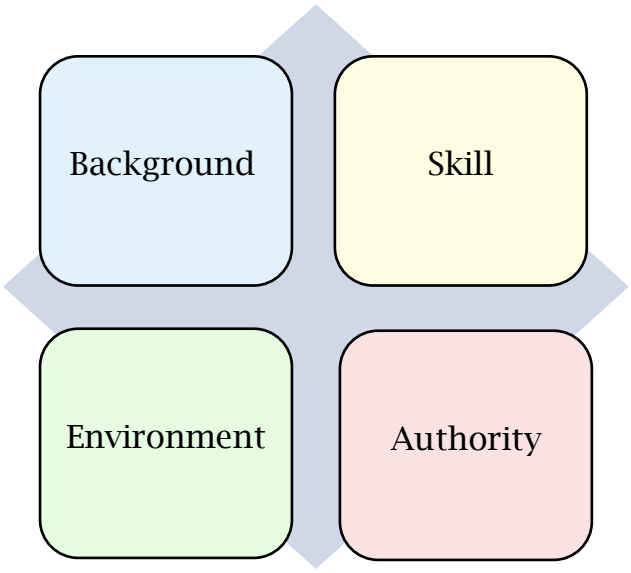


Figure 4 - Position Evaluation Factors (Example)

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

Our job evaluation method involves a quantitative approach. The whole position classification methodology examines your current evaluation criteria and augments it with other factors as needed. Our analysis will include our assessment methodology. We will list broad class concepts and highlight where significant changes may be recommended, such as, expanding or collapsing class series in the same functional area and/or separating or combining classifications assigned to different functional areas. We will review and analyze current classification series, the number of classifications and classification levels, and job families. We will also review, and update established titling guidelines for the studied classifications for appropriate and consistent titling.

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

After preliminary approval of the class concepts and allocation lists, recommendations for new and/or updated class descriptions will be developed for each proposed classification following the format approved by the client.

From the review of the PVPs, desk audit reports and any interviews, we will update duties, responsibilities, and minimum qualifications of each class specification, as necessary, or develop new class specifications if duties, responsibilities, and minimum qualifications have changed significantly. We will recommend new classification/class levels and/or operational changes, business needs, and any reorganizations that require new classifications. Analysis of FLSA, EEO, and ADA requirements will also be analyzed for compliance.

Index of Current to Recommend Job Classes

Current Job Class	New Job Class	Trans Code
Superintendent of Printing	Printing Supervisor	T
Support Services Project Manager	Delete	D
Survey Party Chief	Survey Party Chief	N
Surveyor I	Surveyor	M,D
Surveyor II	Surveyor	S,N
	Utility Locator	J
Switchboard Operator	Clerical Assistant	M,D
Systems Analyst	Systems Analyst	N

Transaction Codes

M – Merge into Other Class
T – Title Modification
D – Delete Class Title
S – Split into Two or More Classes
N – No Change
J – New Job Class

Figure 5 - Sample Index of Current to Recommended Classes

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

Task 1E – Draft of Job Descriptions and Policy Guides

Task E of the project will draft a job class classification and allow for review by the city. This task includes the following activities, principally for new job titles and those that have substantially changed, namely:

- A draft copy of the revised/new class description with an allocation recommendation will be submitted to the Project Leaders.
- Department Heads and managers will receive a copy of their employees' draft job descriptions and will be asked to review their comments and feedback to verify and concur with the information provided.
- Subsequently each manager, supervisor, and employee will be given an opportunity to provide comments and concerns regarding any modifications to the classification structure and specifications.
- Our experience has been that this is one of the most critical phases of the project (but also one of the most time-consuming).
- Our proactive and effective communication process at this crossroad has always avoided formal appeals, adversarial meetings, or major conflicts after the study.
- Paypoint HR will provide a format for the client to show each employee whose position was studied, and how their position is being affected.
- The form will have two options for the employee's signature: one line is reserved for employees who have read and agree with their draft job description; the other line is reserved for employees who have read the draft class description and disagree with certain parts, want to make changes, want to add or delete information, or have general questions about the description and/or the process.

Task 1F – Develop Guide for Implementation of Changes and Draft Interim Report

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

- A recommended classification plan.
- A classification implementation and maintenance manual, including documentation regarding study goals and objectives, classification methodology, approach, and process, as well as analysis and resulting recommendations.
- The recommended allocation list, and classification title changes.
- Classification concepts and guidelines, as well as distinguishing characteristics and other pertinent information for implementation and continued maintenance of the pay plan.

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

Phase 2 Compensation Component

This Section of the study will result in the development of labor market survey parameters and the collection and evaluation of labor market survey data. The findings from the compensation component will be reviewed and analyzed to look for areas of possible improvement. Paypoint HR will create a pay structure that meets the city's objectives. We will give the city perspective on the economic impact adoption of the recommendations will have on the city. This will make the factors for implementation clear and help anticipate needed steps to meet the overall goals.

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

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

- Involving the Study Project Leaders and stakeholders as appropriate, in the decision-making process.
- Agreement on which agencies are included *PRIOR* to beginning the study. Our experience has shown that this is the most advantageous approach.
- Conducting a thorough review of all materials to date including employee database, classification listing, interviews, compensation review, and meetings with the Project Management Team. This will be closely followed by an exploration of the Project Team's overall strategic compensation vision.
- Thoroughly reviewing the various components of existing compensation plans and policies as well as the regulatory environment surrounding compensation.
- Identifying highly competitive positions within the organization and customizing the survey where appropriate.
- Reviewing and discussing how a compensation program might be designed to support the organization's business strategy and organizational objectives.
- Confirming and discussing the Project Team's preferred percentile placement within the marketplace.
- Acknowledging the organization's policy with respect to internal pay equity and employee perceptions of fairness.
- Addressing the Project Team's philosophy with respect to employee retention including the role compensation plays in retention issues.
- Reviewing the Project Team's philosophy with respect to fiscal sensitivity and flexibility.

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

Benchmark positions should encompass the entire range of positions from the beginning of the pay ranges to the end. There should be a number of positions equally interspersed among the pay scale. Positions that have been difficult to attract and retain excellent

employees should be included. Paypoint HR will offer information and examples for the Project Leaders to consider, which will provide a measurable, rational, fact-based methodology to determine the relative job worth within the organization (as required by the EEOC).

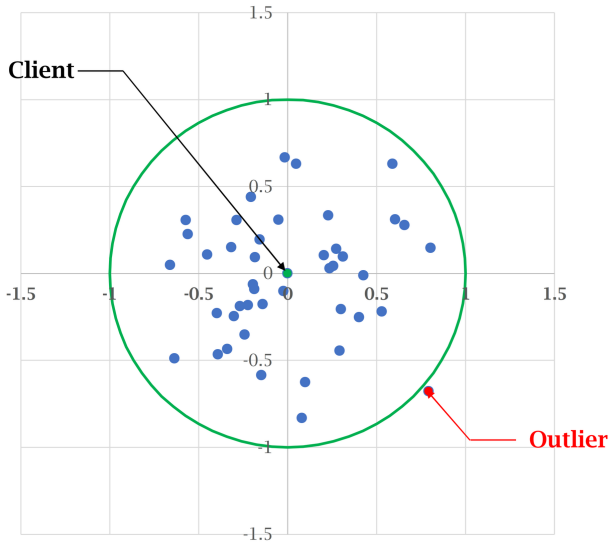


Figure 6 - Illustration of Economic Variance Using the Client as the Baseline

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

Sample List of Selection Criteria

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

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

Task 2B – Design and Distribute Survey

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

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

Task 2C – Collect and Analyze Survey Data

Job Title	Job Summary	Hours	Min	Max
City Clerk's Office				
Administrative Assistant	This work involves complex and responsible clerical support and staff assistance activity. Perform research and retrieval of records, reports, forms, memoranda, letters, etc. HS_GED, + 2 yrs experience.	2080	23.18	37.1
City Clerk	This position is responsible for administrative and supervisory work managing the various functions and responsibilities of the City Clerk's Office. Bachelor's Degree, + 5 yrs experience.	2080	39.66	63.45
Deputy City Clerk	This position is responsible for administrative and supervisory work in planning, organizing, and coordinating administrative activities of the City Clerk's Office. Performs customer service functions including information and assistance related to records research, responds to routine questions, complaints, or requests for service. Associate's Degree, + 3 yrs experience.	2080	26.84	42.95
Development Services				
Building Inspector	This is technical work conducting building inspections to ensure buildings and structures are constructed and tested in compliance with existing City codes, ordinances and statutes. Record and document all building inspections and prepare inspection reports. HS_GED, State of Florida Standard Inspector Certification, + 5 yrs experience.	2080	25.56	40.9
Planner	The work of a Planner is either in the category of current planning, focusing on landscape and development project review, or in long-range planning, focusing on land use, zoning, and land development regulation amendments. Bachelor's Degree, + 2 yrs experience.	2080	24.35	38.96

Figure 7 – Sample of Job Summaries in External Survey

Following the distribution of the surveys, Paypoint HR will collect the data and conduct an in-depth review of the survey results with the Study Project Leaders, as appropriate. The purpose of this review is to identify any additional information needed or areas that require further analysis. Paypoint HR will examine salary spread for all grades, ladders between grades, and identify the possibility of positions being compensated differently than intended from the existing plan. We will examine the distribution of employee salaries to highlight challenges and conduct an analysis of wage compression using Paypoint HR's proprietary statistical processes, if requested. Positions that contribute to compression are specifically identified for adjustment.

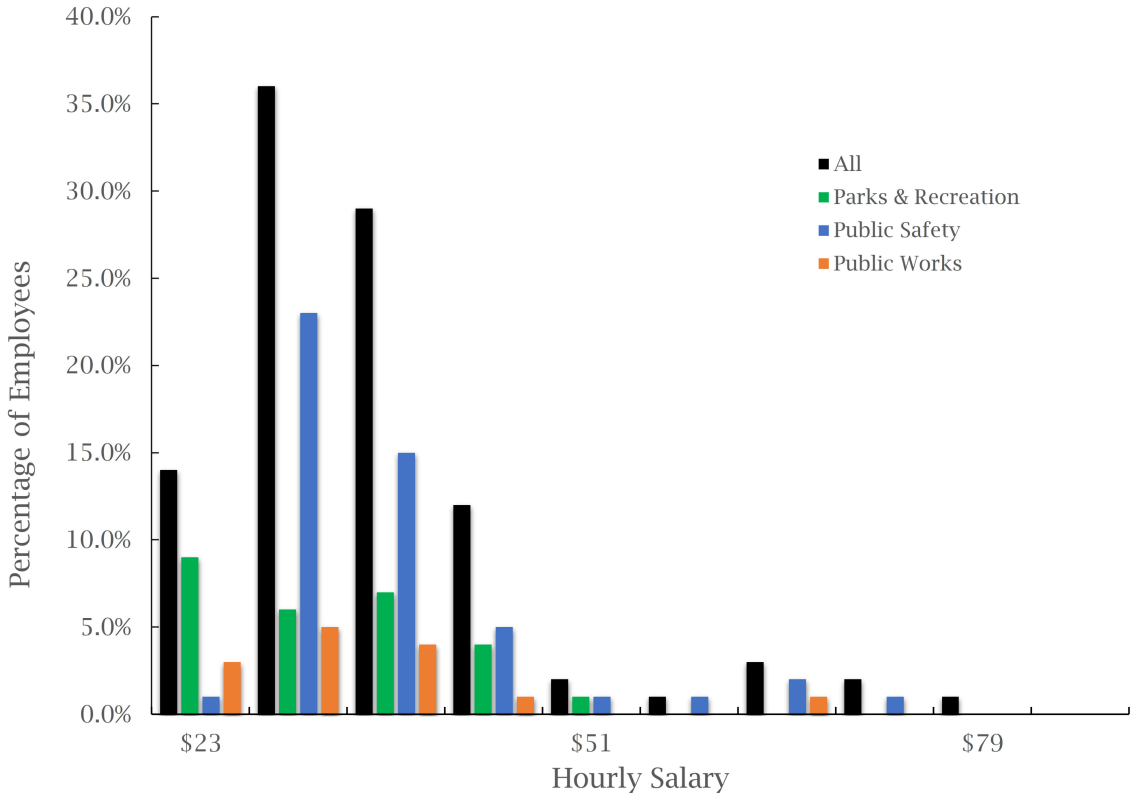


Figure 8 - Baseline Analysis of Client's Workforce

Task 2D – Internal Relationship Analysis and Alignment

To determine recommendations for internal equity, considerable attention will be given to this phase of the project. It is necessary to develop an internal position hierarchy based on the organizational value of each classification. By reviewing those factors, we will make recommendations regarding vertical salary differentials between classes in a class series (if recommended), as well as across departments.

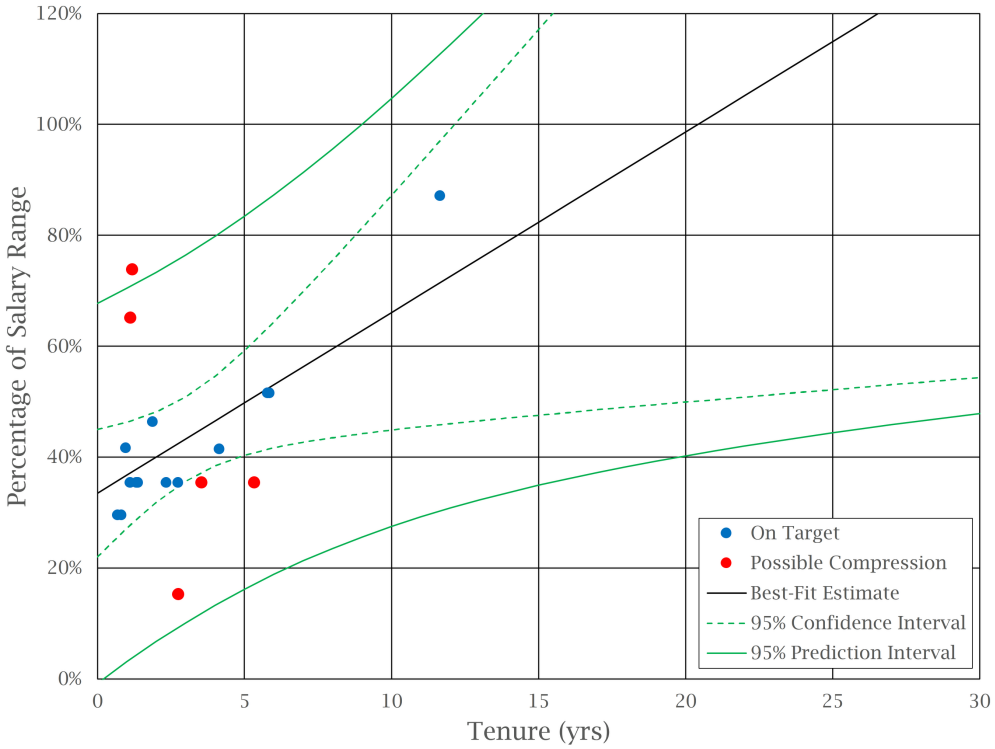


Figure 9 - Sample Internal Compression Analysis

Position Classification	CFS Score
Assistant City Manager	787.8
Police Chief	517.1
Fire Chief	445.8
Utilities Director	374.4
Chief Financial Officer	353.5
Public Works Director	329.4
Development Services Director	229.5
Human Resources Director	215.3
Neighborhood & Community Services Director	212.4
Parks & Recreation Director	210.2

Figure 10 - Sample of Compensable Factor Score Results

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

We will create a sound and logical compensation structure for the various levels within each class series, so that career ladders are not only reflected in the classification system but also in the compensation system. The recommendations will contain pay differentials between levels that allow employees to progress on a clear path for career growth and development. Career ladders will be looked at both vertically and horizontally to mirror the classification structure that was developed during the classification section of the study. Paypoint HR's Compensable Factor Score (CFS) formulation provides a framework to construct an unbiased internal hierarchy of positions.

Category	Score
Education	11.16
Experience	4.65
Complexity	7.60
Independence	3.30
Supervision Received	1.34
Supervision Responsibilities	1.21
Impact	7.84
Physical	0.47
Working Condition	0.31
Interaction	9.30
Financial	1.05
Total Score	**48.22**

Grade	Min	Max
1	0.0	7.0
2	7.0	7.5
3	7.5	8.0
4	8.0	8.6
5	8.6	9.2
6	9.2	9.9
7	10.0	10.8
8	10.8	11.7
9	11.7	12.8
10	12.8	14.0
11	14.0	15.4
12	15.5	17.1
13	17.1	19.0
14	19.0	21.3
15	21.3	24.0
16	24.0	27.1
17	27.1	30.9
18	30.9	35.4
19	35.4	40.9
20	40.9	47.5
21	47.5	55.6

Figure 11 - Compensable Factor Score Example

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

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

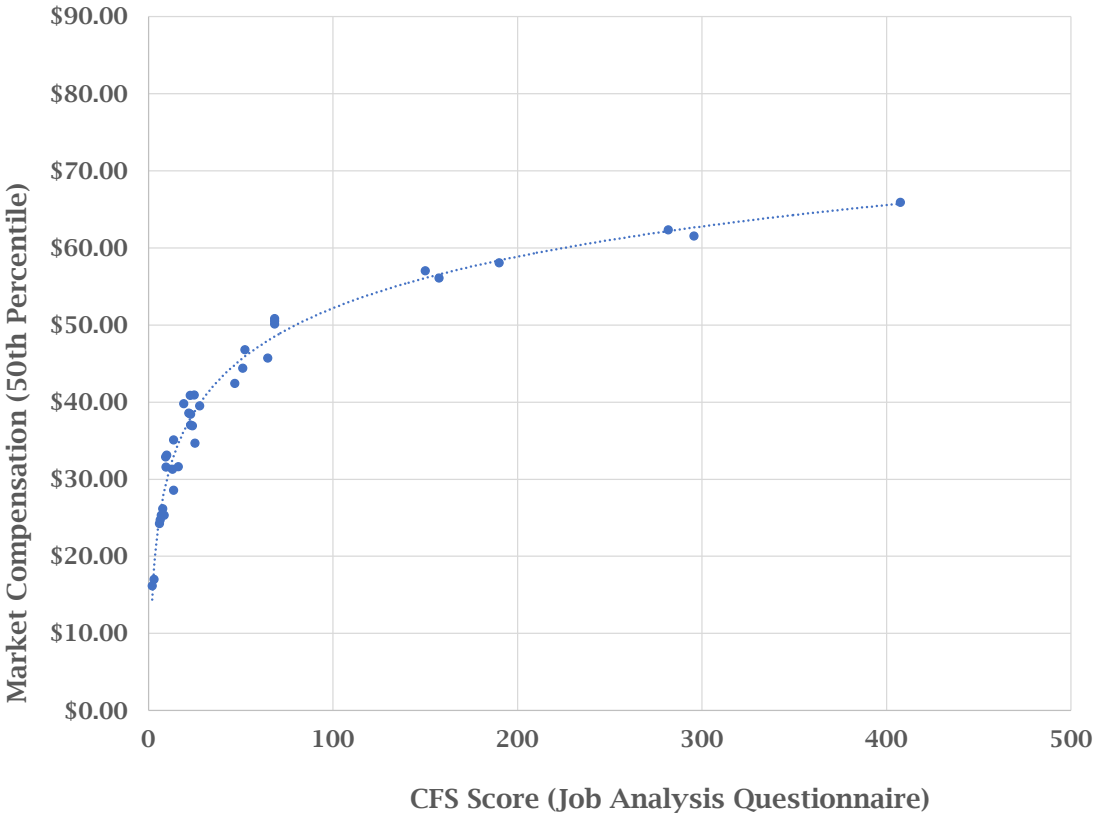


Figure 12 - Sample Comparison of Internal / External Hierarchy

Task 2E – Preparation of Draft Report

Depending on the data developed from the internal analysis, we will review and make recommendations regarding internal alignment of your salary structures including combining or expanding groups or salary scales. We will develop recommendations for pay grades and salary ranges for all classifications based typically on median salaries from the comparable agencies based on the organization's overall compensation philosophy and policy. We will also analyze any pay compression issues to ensure internal equity, if requested.

- We will conduct a competitive pay analysis using the market data gathered to assist in the determination of external pay equity and the recommendation of a new base compensation level for each classification studied.

- We will conduct a comparative analysis to illustrate the relationship between current pay practices and the newly determined market conditions. We will also develop

solutions to address pay equity issues. Our analysis includes information regarding the financial impact of addressing pay equity issues for the city. The result is intended to create a market adjustment and implementation strategy supporting your goals, objectives, and budget considerations.

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

	Engineering Technician II	Engineering Technician III	Engineering Technician IV	Foreman
Market Percentiles				
20%	$32.31	$36.30	$39.16	$39.56
25%	$32.96	$37.10	$40.05	$40.47
30%	$33.67	$37.90	$40.93	$41.35
…	…	…	…	…
70%	$38.82	$43.74	$47.25	$47.75
75%	$39.45	$44.47	$48.06	$48.56
80%	$40.27	$45.42	$49.10	$49.62
Mean	$36.36	$40.95	$44.23	$44.69
Compa-Ratio	-5.0%	-6.9%	-2.4%	-8.1%

Figure 13 - Sample Compa-Ratio Results by Job Title

The Draft Final Report will be completed and submitted to the Study Project Leaders for review and comment. The report will provide detailed compensation findings, documentation, and recommendations. The report will include the following information:

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

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

Full-Time Positions Substantially Below Market (Compa-Ratio % Diff< -10%)

Accreditation Manager	Human Resources Manager
Assistant Fire Chief	IPP Administrator
Benefits Manager	Lead Code Enforcement Officer
Communications Manager	Structural Plan Reviewer
Executive Assistant	System Administrator

Full-Time Positions Below Market (-10% < Compa-Ratio % Diff < -5%)

Accounting Manager	Code Enforcement Officer
Agenda Coordinator	Communications Supervisor
Assistant City Attorney II	Crime Scene Investigation Supervisor
Building Maintenance Superintendent	Cross Connect Control Specialist I
Chief Parking Facilities Administrator	Data Analyst Accreditation Manager
City Manager	Deputy City Clerk

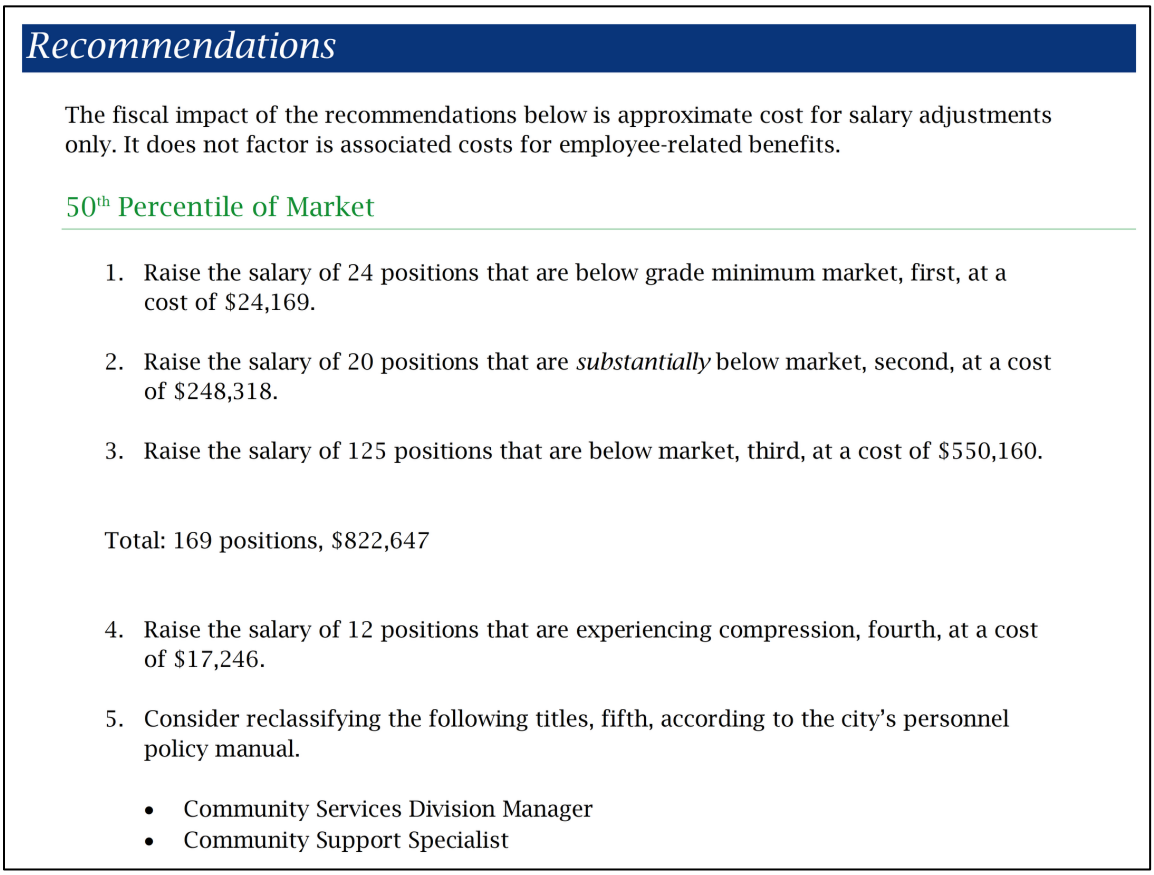
Figure 14 - Sample External Market Results Summary

Task 2F – Deliver Final Report and Deliverables for Implementation

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

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

Our recommendations have been well received by our audiences. We have developed valued relationships and are considered by our clients and their employees as a trusted advisor. We welcome the opportunity to work with the city to prove ourselves as an excellent service-oriented firm.



Recommendations

The fiscal impact of the recommendations below is approximate cost for salary adjustments only. It does not factor is associated costs for employee-related benefits.

50th Percentile of Market

1. Raise the salary of 24 positions that are below grade minimum market, first, at a cost of $24,169.
2. Raise the salary of 20 positions that are *substantially* below market, second, at a cost of $248,318.
3. Raise the salary of 125 positions that are below market, third, at a cost of $550,160.

Total: 169 positions, $822,647

4. Raise the salary of 12 positions that are experiencing compression, fourth, at a cost of $17,246.
5. Consider reclassifying the following titles, fifth, according to the city's personnel policy manual.
   - Community Services Division Manager
   - Community Support Specialist

Figure 15 - Sample of Study Recommendations

Summary of List of Standard Deliverables

- Kick-off meeting with Project Team and collaborative development of the Project Communication Plan.
- Project planning and methodology.
- Briefing Sessions with All Employees to go over the scope of the project, their role, and to give directions on how to complete the job analysis.
- Job Evaluation report completed using scores from job analysis responses.
- Comparator Analysis reports to identify localities that compete for labor with the city.
- Development of agreed benchmark positions.
- External Market Survey for comparators with benchmark job titles and short job summaries.
- Update of Job Descriptions, where applicable, to include FSLA, EEO, and ADA compliance (sample provided upon request).
- Creation of Recommendations for Reclassifications report, including job title simplification.
- Development of a Compensable Factor Scoring System tailored to the city for use and maintenance of job evaluations and internal equity.
- Development of training for ongoing administration and implementation along with supporting materials and manual.
- Development of a salary structure based on the survey findings and job evaluations.
- Survey finding reports showing options for strategic position as compared to current position.
- Fiscal Impact report showing costs associated with the selected strategic market position.
- Cumulative Final Report for presentation which shows methodology, procedures, development of findings, work product deliverables, and the financial impact of recommendations.

Tentative Timeline

Our professional experience is that comprehensive studies of this scope and for this size organization take no more than 16 weeks to complete, allowing for adequate position vantage point completion, interview time, classification description development, compensation data collection and analysis, review of steps by the client, the development of final reports, and any appeals.

The project will be delivered in two phases — Phase 1: Classification and Phase 2: Compensation — totaling approximately 260 professional hours. Key activities include project kickoff, job analysis, classification development, salary survey and market benchmarking, internal equity review, and preparation of final deliverables. A customized project schedule will be finalized with the City at kickoff to reflect internal availability, review windows, and key decision points, ensuring that the process is both rigorous and responsive to City needs.

Throughout the project, Paypoint HR will provide timely written progress reports and schedule interim updates to the Project Team to ensure transparency and alignment. We believe that consistent communication is critical to keeping the project on schedule and addressing any emerging issues quickly and collaboratively.

Figure 16 - Tentative Project Timeline

Month	Phase	Tasks & Milestones	Estimated Hours
January 2026	Phase 1 Tasks A–B	- Project kickoff and stakeholder meetings - Review existing documentation and organizational data - Initiate job analysis process	21 hrs
February 2026	Phase 1 Tasks C–E	- Complete job analysis collection from staff - Evaluate and classify positions - Begin drafting job descriptions and policy documents	72 hrs
March 2026	Phase 1 Task F Phase 2 Tasks A–C	- Finalize classification plan and interim report - Identify benchmark positions and survey comparators - Distribute and collect compensation surveys - Begin market and internal pay analysis	83 hrs
Apriil 2026	Phase 2 Tasks D–F	- Complete compensation analysis - Draft and finalize reports - Deliver presentations and implementation materials	84 hrs

Work Examples

Executive Summary

External Competitiveness Takeaway

Overall, job titles at the City of Bath are compensated 1.0% above market in the region. Compensation is not lagging the market across most departments, as shown below, but especially in Administration where compensation is substantially below market.

Department	Market Position
Administration	-14.3% below market
Assessing	0.0% at market
Clerk	-4.7% below market
Facilities/Transportation	-3.3% below market
Finance	+0.8% above market
Fire	+2.8% above market
Parks and Recreation Department	+1.3% above market
Planning and Development	+5.0% above market
Police	+3.2% above market
Public Works	+3.5% above market
Overall	**1.0% above market**

Recommendations for holistic compensation adjustments for all job titles at the City is delineated in the report. No wage reductions are recommended.

Recommendations

The fiscal impact of the recommendations listed below are approximate costs for salary adjustments for non-represented positions. The fiscal impact does not factor in associated costs for employee related benefits. The fiscal impact of collective bargaining adjustments are not considered.

1. Raise the salary of 4 positions that are below the new grade minimum, first, at a cost of $15,576.

    - 1 Administrative Assistant – Cemetery ($1,495),
    - 1 Deputy City Clerk ($2,174),
    - 1 Deputy Finance Director ($4,579) and
    - 1 Deputy Recreation Director ($7,327).

2. Raise the salary of 5 positions that are *substantially* below market, second, at a cost of $59,583.

    - 1 Custodian – Facilities ($2,650),
    - 1 Executive Assistant to City Manager/Human Resource Director ($18,292),
    - 1 General Assistance Coordinator ($1,460),
    - 1 IT Coordinator ($19,747), and
    - 1 WW Superintendent ($17,434).

3. Raise the salary of 2 positions that are below market, third, at a cost of $11,647.

    - 1 City Clerk ($4,665), and
    - 1 Director of Planning and Development ($6,982).

4. Adjust the salaries of positions that are near market with normal base-salary and tenure adjustments.

5. Discontinue making base-salary adjustments to the salaries of positions that are above or *substantially* above market until compensation is near market.

Table 3 - Economic Data of Bath and Potential Comparators

Community	Population	MHP	MHI	COLA	U Rate	LFP Rate
Bath	8,319	$175,700	$48,252	99.0	5.4%	64.0%
Maine						
Androscoggin County	107,602	$158,200	$53,509	96.0	5.8%	65.5%
Auburn	23,187	$165,200	$49,719	97.0	5.7%	66.7%
Augusta	18,605	$144,800	$43,796	95.0	4.9%	58.5%
Bangor	32,095	$157,000	$46,625	97.0	5.4%	59.7%
Belfast	6,688	$190,500	$62,857	100.0	5.3%	57.9%
Biddeford	21,462	$245,900	$53,120	104.0	5.4%	67.3%
Brewer	9,090	$162,100	$52,174	98.0	4.7%	65.3%
Cumberland County	292,307	$278,100	$73,072	110.0	4.5%	69.1%
Ellsworth	7,991	$178,400	$53,324	98.0	4.4%	68.1%
Franklin County	29,982	$139,800	$51,422	94.0	5.7%	60.8%
Hancock County	54,601	$212,700	$57,178	102.0	4.5%	61.6%
Kennebec County	121,753	$159,400	$55,365	96.0	4.9%	61.6%
Knox County	39,759	$213,400	$57,751	102.0	4.3%	61.7%
Lewiston	36,095	$140,600	$44,523	95.0	7.2%	62.2%
Lincoln County	34,201	$215,400	$57,720	103.0	4.3%	58.6%
Old Town	7,474	$135,700	$42,679	94.0	4.4%	64.7%
Oxford County	57,550	$144,100	$49,204	94.0	5.9%	57.3%
Portland	66,595	$289,000	$60,467	109.0	5.2%	71.9%
Rockland	7,178	$172,800	$44,156	97.0	5.1%	64.1%
Saco	19,497	$258,900	$70,517	109.0	5.1%	72.6%
Sagadahoc County	35,452	$213,400	$63,694	103.0	4.3%	65.0%
Sanford	21,015	$171,200	$49,642	99.3	5.0%	64.0%
South Portland	25,548	$257,200	$69,290	110.0	4.5%	71.6%
Waldo County	39,539	$163,000	$51,931	97.0	5.1%	60.7%
Waterville	16,577	$125,000	$38,862	93.0	6.0%	53.5%
Westbrook	18,633	$232,900	$59,460	105.0	5.4%	69.3%
York County	204,316	$252,300	$67,830	107.0	4.5%	66.3%

Overall Salary Distribution

The salary distribution for all employees is shown in Figure 1. The label "Percentage of Employees" on the ordinate y-axis reflects the total number of employees. The three largest departments, Fire, Police, and Public Works are highlighted.

A clear bimodal pattern does not exist which would demonstrate a two-tier compensation structure for any department of overall. It is preferable if there is a clear broad-banded bimodal distribution, that is, two bell curves, demonstrating both separation between supervisory and non-supervisory compensation and career progression within these two groups.

The concentration of employees in the upper end, top 20%, of the salary range (3 of 102, 3%) in comparison to the lower end is not excessive, meaning that the organization is not top-heavy with respect to compensation.

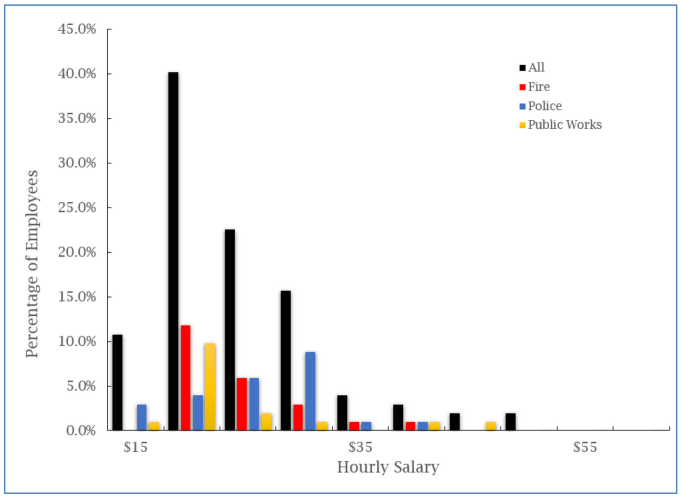


Figure 1 – Salary Distribution

Compensable Factor Score from Position Vantage Point

To assist in determining the internal hierarchy of positions in the County, the employees and managers participated in the Position Vantage Point Job Survey. Questions asked in the PVP are divided into four areas: Background, Authority, Skill, and Environment. In these four areas, the following compensable factors were examined:

Education	Complexity
Certifications	Independence
Work Duties	Impact
Work Experience	Physical
Financial Authority	Working Conditions
Supervision	Interaction

Job descriptions were consulted to update both the minimum education level and minimum experience level required for each position. The responses were then evaluated, producing the Compensable Factor Score (CFS) as shown below. For positions, where there was insufficient data from the employee/manager survey, job descriptions were consulted to fill out the survey.

Table 23 – Compensable Factor Score

Position Classification	CFS Score
Finance Director/Assistant City Manager	829.4
Director of Cemetery, Parks and Recreation	457.6
Director of Public Works	378.5
Chief of Police	330.4
Fire Chief	316.0
Deputy Director of Public Works	314.5
WW Superintendent	203.7
Deputy Chief of Police	157.0
Deputy Fire Chief	149.3
Assessor	125.7

External Market Comparison

A summary of the findings of the external market analysis is presented in Table 24 through Table 28. In Table 29 through Table 33, the external market findings for all position classifications is presented. The minimum, midpoint, and maximum hourly salary for each position classification is presented first. The market average (mean) and the various market quantiles are then presented. Lastly the Compa-Ratio, the ratio of the grade's midpoint divided by the 50th percentile from the external market, which measures the extent of the deviation of the current salary range in comparison to the market median, is presented.

Table 24 – Full-Time Positions Substantially Below Market (Compa-Ratio % Diff< -10%)

Arborist	General Assistance Coordinator
Custodian – Facilities	IT Coordinator
Director of Community & Economic Development	WW Superintendent
Executive Assistant to City Manager/Human Resource Director	

Table 25 – Full-Time Positions Below Market (-10% < Compa-Ratio % Diff < -5%)

City Clerk	Director of Planning and Development
Detective	

Table 26 – Full-Time Positions Near Market (-5% < Compa-Ratio % Diff < +5%)

Administrative Assistant - Cemetery	Crossing Guard
Administrative Assistant - Fire	Custodian - Recreation
Administrative Assistant - Recreation	Data Entry/Analyst
Animal Control Officer	Deputy Chief of Police
Assessor	Deputy City Clerk
Assistant Assessor	Deputy Director of Public Works
Bus Driver	Deputy Finance Director
Chief of Police	Deputy Fire Chief
Code Enforcement Officer	Deputy Recreation Director

Table 29 – External Market Comparison – Non-Represented

	Admin Assistant Cemetery	Admin Assistant Fire	Admin Assistant Police	Admin Assistant PW	Admin Assistant Recreation
Current Scale					
Minimum	$19.21	$19.21		$19.21	$19.21
Midpoint	$22.29	$22.29	$31.25	$22.29	$22.29
Maximum	$25.37	$25.37		$25.37	$25.37
Market Percentiles					
20%	$19.46	$19.24	$20.08	$18.96	$19.44
25%	$19.94	$19.45	$20.16	$19.00	$19.88
30%	$20.15	$19.53	$20.88	$19.08	$20.15
35%	$21.61	$19.58	$21.45	$19.32	$21.07
40%	$22.12	$20.18	$21.47	$19.60	$21.74
45%	$22.40	$20.52	$21.92	$19.67	$22.04
50%	$22.60	$21.57	$22.39	$20.54	$22.06
55%	$23.43	$22.09	$23.06	$21.15	$22.13
60%	$24.52	$22.38	$23.56	$21.55	$22.38
65%	$24.91	$22.44	$24.97	$21.59	$22.64
70%	$25.33	$22.44	$25.34	$21.82	$23.18
75%	$25.64	$22.66	$26.99	$22.18	$23.87
80%	$26.64	$23.05	$29.62	$22.70	$24.62
Mean	$23.56	$21.37	$24.04	$20.90	$22.21
Compa-Ratio	-1.3%	+3.4%	+39.6%	+8.5%	+1.0%

Proposed Salary Schedules

A recommended salary scale for all Non-Represented employees is shown in Table 34. The spread between the minimum and maximum salary was set to 30% as the average spread adopted by comparable communities from the external survey was 28.5%. The number of pay grades was set to 16 to accommodate the range of CFS Scores. The Ladders, i.e., the distance between grades, was set to be 7.5%. Larger Ladders were included to increase the incentive for employees to seek positions of greater responsibility and to make it financially beneficial.

It is recommended that in subsequent years after the adoption of the recommended pay plan, the City should adjust the entire salary scale by the CPI annually as budget permits.

Table 34 – Proposed Salary Schedule – Non-Represented

Grade	Min	Mid	Max
B01	$15.00	$17.25	$19.50
B02	$16.13	$18.54	$20.96
B03	$17.33	$19.93	$22.53
B04	$18.63	$21.43	$24.22
B05	$20.03	$23.04	$26.04
B06	$21.53	$24.76	$27.99
B07	$23.15	$26.62	$30.09
B08	$24.89	$28.62	$32.35
B09	$26.75	$30.76	$34.78
B10	$28.76	$33.07	$37.39
B11	$30.92	$35.55	$40.19
B12	$33.23	$38.22	$43.20
B13	$35.73	$41.09	$46.44
B14	$38.41	$44.17	$49.93
B15	$41.29	$47.48	$53.67
B16	$44.38	$51.04	$57.70

Proposed Internal Equity

In Table 40, the resulting proposed internal equity for the City is presented for non-represented job titles.

Table 40 – Proposed Internal Equity

Grade	Title
B16	Finance Director/Assistant City Manager
B15	-
B14	Chief of Police Director of Cemetery, Parks and Recreation Director of Public Works Fire Chief
B13	Deputy Director of Public Works
B12	Deputy Chief of Police Deputy Fire Chief WW Superintendent
B11	Assessor City Clerk Code Enforcement Officer Deputy Finance Director Director of Community and Economic Development Director of Planning and Development Director of Sustainability and Environment Facilities Director
B10	Executive Assistant to City Manager/Human Resource Director IT Coordinator
B09	Deputy Recreation Director Foreman - Cemetery PW Foreman
B08	Arborist Work Leader – Recreation
B07	Payroll Supervisor
B06	Assistant Assessor Deputy City Clerk Treasurer Clerk/Deputy Tax Collector

Recommended Salary Adjustments

A regression analysis of the CFS Score and the salary survey results indicate that market median salary for all positions is predicted very well by the CFS Score. The coefficient of determination is **94.4%**, in other words, the knowledge, skills, and abilities identified in the employee/manager Position Vantage Point job description survey correlate very well with the external markets' valuation of the non-represented job positions at Bath.

In Table 41,salary recommendation for employees based on the external market findings is presented.

Table 41 –Salary Adjustments – Non-Represented

Title	Current Rate	New Grade	New Rate
Administration			
Executive Assistant to City Manager/Human Resource Director	$28.59	B10	$37.39
IT Coordinator	$23.62	B10	$33.11
Marketing and Communication Specialist	$22.29	B05	$22.29
Digital Media and IT Specialist	$19.93	B04	$19.93
Assessing			
Assessor	$37.03	B11	$37.03
Assistant Assessor	$24.46	B06	$24.46
Cemetery, Parks and Recreation			
Administrative Assistant - Cemetery	$19.21	B05	$20.03
Administrative Assistant - Recreation	$25.37	B05	$25.37
Custodian – Recreation	$16.69	B02	$16.69
Deputy Recreation Director	$23.23	B09	$26.75
Director of Cemetery, Parks and Recreation	$45.82	B14	$45.82
Laborer – Recreation	$24.39	B04	$24.39
Work Leader – Recreation	$29.37	B08	$29.37

BROKEN ARROW
Where opportunity lives

Department: City Clerk / Municipal Court Clerk

CITY CLERK ADMINISTRATIVE TECHNICIAN

Effective Date: Revised:	FLSA Status: 1	Grade: A02	Page 1 of 3

Job Title City Clerk Administrative Technician
Reports To City Clerk
Positions Supervised

CITY CLERK ADMINISTRATIVE TECHNICIAN's role within the big picture of the City's overall success.

Under general supervision, performs customer service and clerical duties in support of the City Clerk's Office, ensuring accurate and timely processing of City Council and other meeting minutes, and managing document filing and open records requests.

Education, Experience, and Special Requirements – An equivalent combination of education, training and experience may be considered.

Education HS_GED
Experience 6 months previous relevant work experience is required.
Certifications and Special Requirements This position performs duties deemed to be 'safety sensitive' and is therefore subjected to random drug testing under the City's policies.
Licensing Valid Driver's License issued by the State of Oklahoma.

CITY CLERK ADMINISTRATIVE TECHNICIAN functions include but are not limited to the following.

City Council Duties:
- Post City Council, BAMA, and BAEDA agendas, prepare meeting materials, and assist in the creation of minutes for review and approval.

Mail Management:
- Use the postage machine to process City mail, distribute to departments, and track certified mail and delivery receipts.

Document Tracking:
- Log, track, and archive all documents received, including Council records, contracts, and easements, ensuring accurate record-keeping and timely filing.

Open Records Requests:
- Log requests, follow up with departments for completion, and ensure all responses to open records requests are accurate and timely.

Assist with Legislative Documentation:
- Support the City Clerk in preparing legislative documents, including resolutions, ordinances, and official proclamations. Ensure that all documents meet the required legal standards before submission to the governing bodies.

Provide Customer Service to Public Inquiries:
- Respond to inquiries from the public about city services and procedures. Provide accurate information about records access, city meetings, and legal document requests.

The individual in this role is expected to contribute to the team's efforts and may be required to complete other related tasks, as may be assigned.

BROKEN ARROW
Where opportunity lives

Department: City Clerk / Municipal Court Clerk

CITY CLERK ADMINISTRATIVE TECHNICIAN

Effective Date: Revised:	FLSA Status: 1	Grade: A02	Page 2 of 3

Success Framework. The following list of knowledge, skills, and abilities have been identified by our team as building blocks towards efficiency and effectiveness in this role.

- Knowledge of document filing and retrieval systems.
- Proficiency in data entry and customer service.
- Ability to manage and maintain public records accurately.
- Strong attention to detail.
- Ability to assist with permit applications and inquiries.
- Capacity to organize and maintain office supplies.
- Ability to coordinate with city departments.
- Knowledge of administrative processes and procedures.
- Strong verbal communication skills for public interactions.
- Ability to work independently and as part of a team.

Equipment and Tools commonly associated with the performance of the functions of this job.

Basic office equipment (e.g., computers, printers, copiers, scanners, and fax machines). Postage machine and label maker. Microsoft Office Suite (Word, Excel, PowerPoint, Outlook). Communication and remote meeting platforms (e.g., Zoom, Microsoft Teams), telecommunications, records management software, scheduling software. Government experience management software and media platforms. Adobe creative and document management tools. Notary stamp. Department vehicles.

Work Environment or atmospheric conditions commonly associated with the performance of the functions of this job.

- Work environment varies depending on departmental needs, including office, field, or specialized settings.
- May occasionally be exposed to uncomfortable temperatures, humidity, noise, chemicals/gases, contagious diseases, airborne particles/pathogens, and/or physical trauma.

* **Physical Abilities.** The physical demands described below are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- Work requires the ability to sit, stand, walk for extended periods of time.
- Work requires the ability to complete repetitive wrist, hand, and/or fine motor movement.
- Work requires the ability to grasp, pull, push, and reach.
- Work requires the ability to talk, hear, listen, and comprehend.
- Work requires the ability to drive and/or operate mechanical equipment.
- Must be able to lift pounds.
- Work requires visual acuity of 20 feet or more, visual acuity of 20 inches or less, three dimensional vision, precise hand/eye coordination

* The City of Broken Arrow offers reasonable accommodation in the hiring and employment process for individuals with disabilities. If you need assistance to accommodate a disability, you may request an accommodation at any time.

D. References

Reference 1:

Client Name:	City of Muscatine, Iowa
Contact Person & Title:	Stephanie Romagnoli HR Manager
Phone:	563-264-1550
Email:	SRomagnoli@MuscatineIowa.gov
Brief Description of Project:	Compensation Study

Reference 2:

Client Name:	City of Cottage Grove, MN
Contact Person & Title:	Joe Fischbach HR Manager
Phone:	654-458-2883
Email:	JFischbach@CottageGroveMN.gov
Brief Description of Project:	Position Classification and Compensation System

Reference 3:

Client Name:	Knox County, IL
Contact Person & Title:	Robin Davis County Treasurer
Phone:	309-343-7002
Email:	RDavis@CO.Knox.IL.US
Brief Description of Project:	Classification and Compensation Study

Appendix – Sample PVP Job Description Survey

Position Vantage Point

Paypoint HR

First Name

Last Name

Job Location

Department

Job Title

Full-time / Part-time

Job Summary

Please provide a summary for the purpose of the position in one or two sentences.

Where Position Fits

Complete the structure using job titles to show where your job fits. Use official classification titles only, not working titles.

Supervisor's Title

Job Titles of Peers / Co-workers (Reporting directly to same supervisor)

Jobs Reporting Direct to Position (If applicable)

Position Vantage Point

Paypoint HR

Education and Experience

Minimum Education Level that Should be Required for Job Title

- [ ] No Degree
- [ ] High School Diploma / GED
- [ ] Trade School Certificate
- [ ] Associate Degree in a Related Field
- [ ] Associate Degree Not in a Related Field
- [ ] Bachelor Degree in a Related Field
- [ ] Bachelor Degree Not in a Related Field
- [ ] Master Degree in a Related Field (MA/MS/MBA)
- [ ] Master Degree Not in a Related Field (MA/MS/MBA)
- [ ] Specialist Degree in a Related Field
- [ ] Specialist Degree Not in a Related Field
- [ ] Doctorate Degree in a Related Field (PhD/JD/EdD)
- [ ] Doctorate Degree Not in a Related Field (PhD/JD/EdD)
- [ ] Other

Degree Field Required for Job Title (e.g., Finance, Business Administration, Civil Engineering)

Required Certifications, Training, and Licensing for Job Title (e.g., Driver's License, CDL, CPR)

Upon entering position: the minimum number years of prior experience in profession required.
(e.g., For Police Lieutenant: 8 years as a certified sworn officer, all ranks including Officer and Sergeant)

- [ ] 0
- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4 to 5
- [ ] 6 to 7
- [ ] 8 to 10
- [ ] More than 10

Upon entering position: the minimum number of years in preceding job in job series required
(e.g., For W/WWTP Operator III: 3 years as a W/WWTP Operator II)

- [ ] 0
- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4 to 5
- [ ] 6 to 7
- [ ] 8 to 10
- [ ] More than 10

Position Vantage Point

Equipment/Tools (e.g., GIS, Microsoft Office, Backhoe, Narcan)

Visual Acuity (check all that apply)

- ☐ Clarity of vision at 20 feet or more
- ☐ Clarity of vision at 20 inches or less
- ☐ Three-dimensional vision – ability to judge distance and space relationships
- ☐ Precise hand-eye coordination
- ☐ Ability to identify and distinguish colors

Regulatory (Enter number associated with category)

EEO Category Number (if known) ☐

1 – Officials / Administrators
2 – Professionals
3 – Technicians
4 – Protective Service Workers
5 – Paraprofessionals
6 – Office / Clerical
7 – Skilled Craft Workers
8 – Service / Maintenance

FLSA Status and Exemption (if known) ☐

1 – Non-exempt
2 – Exempt – Executive
3 – Exempt – Administrative
4 – Exempt – Computer
5 – Exempt – Professional Learned or Creative

Position Vantage Point

Paypoint HR

Duties and Responsibilities (to identify major duties and responsibilities)

EXAMPLE

Percent of time spent

40%

Priority (Select one)

Essential	X
Very important	
Important	
Somewhat important	
Marginal	

Result Expected of the Work

Payroll administration for the maintenance department

Tasks Required to Achieve Result

Collecting payroll information from department employees on a weekly basis; reviewing the collected information to make sure that it is complete; forwarding all appropriate documentation (timecards, requests for time off, etc.) to the business office for processing.

Task 1

Percent of time spent

Priority (Select one)

Essential	
Very important	
Important	
Somewhat important	
Marginal	

Result Expected of the Work

Tasks Required to Achieve Result

Task 2

Percent of time spent

Priority (Select one)

Essential	
Very important	
Important	
Somewhat important	
Marginal	

Result Expected of the Work

Tasks Required to Achieve Result

Position Vantage Point

Paypoint HR

Duties and Responsibilities (to identify major duties and responsibilities)

Task 3

Percent of time spent

Priority (Select one)

- Essential
- Very important
- Important
- Somewhat important
- Marginal

Result Expected of the Work

Tasks Required to Achieve Result

Task 4

Percent of time spent

Priority (Select one)

- Essential
- Very important
- Important
- Somewhat important
- Marginal

Result Expected of the Work

Tasks Required to Achieve Result

Task 5

Percent of time spent

Priority (Select one)

- Essential
- Very important
- Important
- Somewhat important
- Marginal

Result Expected of the Work

Tasks Required to Achieve Result

Position Vantage Point

Paypoint HR

Work Environment (Check all that apply)

	Never (0%)	Rarely (1% - 15%)	Occasionally (16% - 40%)	Frequently (41% - 70%)	Regularly (over 70%)	Specific Examples
EXAMPLE: Standing	☐	☐	X	☐	☐	Speaking at public events
Sitting	☐	☐	☐	☐	☐	
Talking	☐	☐	☐	☐	☐	
Hearing	☐	☐	☐	☐	☐	
Standing	☐	☐	☐	☐	☐	
Walking	☐	☐	☐	☐	☐	
Driving	☐	☐	☐	☐	☐	
Grasping, pulling, pushing	☐	☐	☐	☐	☐	
Stooping, kneeling, crouching, crawling	☐	☐	☐	☐	☐	
Climbing or balancing	☐	☐	☐	☐	☐	
Repetitive wrist, hand and/or finger movement	☐	☐	☐	☐	☐	
Work in high, dangerous places	☐	☐	☐	☐	☐	
Work in confined spaces	☐	☐	☐	☐	☐	
Operate mechanical equipment	☐	☐	☐	☐	☐	
Biohazard or bloodborne pathogens	☐	☐	☐	☐	☐	
Required to wear respirator	☐	☐	☐	☐	☐	
Fumes or airborne particles	☐	☐	☐	☐	☐	
Risk of electrical shock	☐	☐	☐	☐	☐	

Position Vantage Point

Paypoint HR

Note: Answer each question independent of any preceding questions. For example: a position that often involves complex and diversified tasks may also involve routine or repetitive tasks. Enter 1 to 5, 1 – Strongly Disagree with the statement to 5 – Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Complexity (Answer all questions)

- **Question 1**: This position involves *routine or repetitive* tasks, processes, or operations requiring the application of well-defined rules, procedures, policies, guidelines, and/or instructions.
- **Question 2**: This position involves generally *standardized* tasks processes, or operations requiring the *choice of action* within well-defined rules, procedures, policies, guidelines, and/or instructions.
- **Question 3**: This position involves generally *diversified* tasks, processes, or operations requiring the *choice of action* within well-defined rules, procedures, policies, guidelines, and/or instructions.
- **Question 4**: This position involves *occasional (16% - 40%) complex and diversified* tasks, processes, or operations requiring the *development* of rules, procedures, policies, guidelines, and/or instructions..
- **Question 5**: This position involves *frequent (41% - 70%) complex and diversified* tasks, processes, or operations requiring the *development* of rules, procedures, policies, guidelines, and/or instructions.

Independence (Answer all questions)

- **Question 1**: My position primarily involves *detailed* work instructions with *close* supervisory review.
- **Question 2**: My position primarily involves *detailed* work instructions with *regular* supervisory review.
- **Question 3**: My position primarily involves *general* work instructions with *regular* supervisory review.
- **Question 4**: My position primarily involves *broad latitude* on work tasks with *regular* supervisory review.
- **Question 5**: My position primarily involves *broad latitude* on work tasks with *minimal* supervisory review.

Position Vantage Point

Paypoint HR

Note: Answer each question independent of any preceding questions. For example: a position that involves employee training may also schedule tasks. Enter 1 to 5, 1 – Strongly Disagree with the statement to 5 – Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Supervision Received (Answer all questions)

- ☐ **Question 1**: My position frequently (41% - 70%) is provided *established* policy and procedures.
- ☐ **Question 2**: My position frequently (41% - 70%) is provided *specific* direction and task/project information needed is *generally* available.
- ☐ **Question 3**: My position frequently (41% - 70%) is provided *general* direction and task/project information needed is *generally* available.
- ☐ **Question 4**: My position frequently (41% - 70%) is provided *general* direction and task/project information is usually *not readily* available and must be sought.
- ☐ **Question 5**: My position frequently (41% - 70%) is provided *minimal* direction and task/project information is *regularly* vague.

Supervision Responsibilities (Answer all questions)

- ☐ **Question 1**: My position involves the training and guidance of other employees and provides input to supervisors with respect to employee performance.
- ☐ **Question 2**: My position involves the assignment and scheduling of tasks of others.
- ☐ **Question 3**: My position is directly responsible for the performance of others.
- ☐ **Question 4**: My position directs employee performance evaluation including hiring, promotion, discipline, and termination.
- ☐ **Question 5**: My position has absolute authority to hire, discipline, and terminate employees with the involvement of human resources.
- ☐ **Question 6**: Total number of people who report to your position in the organization. (E.g., For a department head, all employees in the department would be included.)

Position Vantage Point

Paypoint HR

Note: Answer each question independent of any preceding questions. For example: a position that is occasionally somewhat strenuous may also be occasionally very strenuous. Enter 1 to 5, 1 – Strongly Disagree with the statement to 5 – Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Impact (Answer all questions)

- **Question 1**: Mistakes made in my position typically lead to only *minor* costs, waste, or inconvenience.
- **Question 2**: Mistakes made in my position may lead to *some* costs, waste, or inconvenience.
- **Question 3**: Mistakes made in my position may lead to *significant* costs, waste, or inconvenience.
- **Question 4**: Mistakes made in my position may lead to *major* costs, waste, or inconvenience and *short-term* impact to the direction, goals, and reputation of the organization.
- **Question 5**: Mistakes made in my position may lead to *major* costs, waste, or inconvenience and *long-term* impact to the direction, goals, and reputation of the organization.

Physical (Answer all questions)

- **Question 1**: On occasion (16% - 40%), my position is *slightly* strenuous often requiring *minimal* physical exertion and/or lifting of *minimal* weight (< 5 pounds).
- **Question 2**: On occasion (16% - 40%), my position is *somewhat* strenuous often requiring *light* physical exertion and/or lifting of *light* weight (< 20 pounds).
- **Question 3**: On occasion (16% - 40%), my position is *s*trenuous often requiring *some* physical exertion and/or lifting of *moderate* weight (< 40 pounds).
- **Question 4**: On occasion (16% - 40%), my position is *very* strenuous often requiring physical exertion and/or lifting of *heavy* weight (< 60 pounds).
- **Question 5**: On occasion (16% - 40%), my position is *extremely* strenuous often requiring *substantial* physical exertion and/or lifting of *especially heavy* weight (> 60 pounds).

Position Vantage Point

Paypoint HR

Note: Answer each question independent of any preceding questions. For example: a position that involves interaction with vendors may also involve interaction with senior managers. Enter 1 to 5, 1 – Strongly Disagree with the statement to 5 – Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Working Condition (Answer all questions)

- **Question 1**: My position *rarely (1% - 15%) or never (0%)* involves exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- **Question 2**: My position often involves *occasional (16% - 40%)* exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- **Question 3**: My position often involves *frequent (41% - 70%)* exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- **Question 4**: My position often involves *regular (over 70%)* exposure to uncomfortable temperature, noise, chemicals/gases, contagious diseases, airborne pathogens, and/or physical trauma.
- **Question 5**: My position often involves potentially *life-threatening* exposure temperature, noise, chemical/gases, contagious diseases, airborne pathogens, and/or physical trauma.

Interaction (Answer all questions)

- **Question 1**: My position requires *frequent (41% - 70%)* interaction with employees or supervisors within my work area.
- **Question 2**: My position requires *frequent (41% - 70%)* interaction with employees and supervisors of other departments.
- **Question 3**: My position requires *frequent (41% - 70%)* interaction with administrative and technical staff including those outside the organization, i.e., vendors.
- **Question 4**: My position requires *frequent (41% - 70%)* interaction with executive level employees, senior managers, and directors.
- **Question 5**: My position requires *frequent (41% - 70%)* interaction with individuals outside the organization including community leaders, citizens, and the media.

Position Vantage Point

Paypoint HR

Note: Answer each question independent of any preceding questions. For example: position that involves petty cash purchases may also manage the department budget. Enter 1 to 5, 1 – Strongly Disagree with the statement to 5 – Strongly Agree.

Strongly Disagree	Somewhat Disagree	Neither Agree Nor Disagree	Somewhat Agree	Strongly Agree
1	2	3	4	5

Financial (Answer all questions)

☐ **Question 1**: My position is responsible for minor/petty cash purchases.

☐ **Question 2**: My position is involved with financial/budgetary matters including purchase orders, payments, grant funds, employee benefits, and the like.

☐ **Question 3**: My position manages the budget for the department / work unit.

☐ **Question 4**: My position allocates funds for the various departments / work units.

Question 5: The greatest value that my position has purchasing authority without approval by another individual or external authority. **(Select only one)**

☐ None
☐ Less than $1,000
☐ Less than $2,500
☐ Less than $5,000
☐ Less than $10,000
☐ Less than $25,000
☐ Less than $50,000
☐ More than $50,000

Additional Information

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	Paypoint HR
Mailing Address:	695 Santa Maria Ln Davidsonville, MD 21035
Website:	www.PaypointHR.com
Year Firm Established:	2015
Office Location Performing the Work:	Davidsonville, MD
Primary Contact Person:	Karin VM Campbell
Title:	CEO
Phone:	443-336-4272
Email:	Karin@PaypointHR.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [ ] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [ ] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

Section 4: Acknowledgement of Addenda and RFP Terms

By signing below, the undersigned, an authorized representative of the firm, acknowledges the following:

1. Receipt of all addenda issued for RFP SALARY STUDY. List Addenda Numbers received:
   None
2. The firm has read, understands, and agrees to all terms, conditions, and requirements set forth in the RFP document.
3. The proposal submitted is valid for a minimum of 90 days from the submission deadline.
4. The individual signing below is authorized to bind the firm to a contract.

Signature:	Karin VM Campbell
Printed Name:	Karin VM Campbell
Title:	CEO
Date:	10/28/25

SYNERGIZED HR

NOVEMBER

2025

The City of Independence, Iowa

Classification and Compensation Study

Prepared by:

Jackie Kennedy, SHRM-SCP

We are excited about the opportunity to support The City of Independence and look forward to further discussing this proposal.

SYNERGIZED HR
PO BOX 630620, HIGHLANDS RANCH, CO 80163

Part A – Transmittal Letter

November 14, 2025

Matthew R. Schmitz, City Manager
City of Independence
331 1st Street E
Independence, IA 50644

Subject: RFP SALARY STUDY

Dear Mr. Schmitz:

Synergized HR is pleased to submit this proposal to partner with the City of Independence on its comprehensive **Classification and Compensation Study**, including the development of updated job descriptions for every position across the organization. As a **woman-owned and veteran-owned** human resources consulting firm with extensive experience serving public-sector and quasi-public entities, we understand the City's desire for a system that is **internally equitable, externally competitive, transparent, and fiscally sustainable**.

Our firm specializes in public-sector classification and compensation work for municipalities, counties, special districts, libraries, and higher education institutions. We bring a deeply structured and defensible methodology supported by strong communication practices, clear documentation standards, and a commitment to accuracy and quality. Our experience leading similar studies for operationally diverse organizations positions us well to support the City's goals of modernization, consistency, and long-term system maintainability.

We understand that this project represents a strategic investment in the City's workforce and operational future. Our approach emphasizes a collaborative process; a thorough and well-designed job analysis phase; the development of clear, ADA-compliant, and legally defensible job descriptions; a balanced compensation philosophy; a robust market analysis; and a practical, data-driven approach to implementation planning. Together, these elements form a comprehensive foundation for a modern, sustainable compensation framework.

Synergized HR affirms that this proposal will remain valid for at least **90 days** and complies with all submission requirements outlined in the RFP. I am authorized to bind the firm contractually and welcome any opportunity to discuss our proposal further.

Thank you for your consideration. We look forward to the potential opportunity to support the City of Independence in this important initiative.

Sincerely,

Jackie Kennedy, SHRM-SCP
Owner & CEO, Synergized HR
jackiekennedy@synergizedhr.com

Part B – Firm Experience & Qualifications

About Synergized HR

Synergized HR is a woman-owned and veteran-owned human resources consulting firm specializing in compensation analysis, classification studies, workforce planning, and organizational effectiveness for public-sector and publicly funded organizations. Our firm brings more than 20 years of progressive HR leadership experience within municipal, quasi-governmental, nonprofit, and regulated environments.

We provide data-driven analysis, clean reporting, and practical recommendations tailored to the unique needs of government entities. Our approach is grounded in transparency, defensibility, and communication that supports staff, leadership, and elected officials throughout the process.

Core Competencies

- **Classification & Compensation Studies -** Salary benchmarking, internal equity analysis, pay plan development, job documentation, total compensation evaluation.
- **Job Analysis & Job Description Development -** ADA-aligned job descriptions, job analysis questionnaires (JAQs/PAQs), interviews with staff/leadership, FLSA validation.
- **Public-Sector Workforce Strategy -** Organizational structure evaluation, succession planning guidance, staffing models, policy development.
- **Data Analysis & Reporting -** Market survey development, spreadsheet modeling, compensation structure design, fiscal impact modeling.
- **Stakeholder Engagement & Communication -** Council/Board presentations, leadership briefings, project progress reporting, implementation support.

Firm Strengths Aligned to This Project

- **Specialized public-sector HR expertise** including municipal, special district, and publicly funded programs.
- **Direct experience leading full compensation, job analysis, and classification projects** similar to the City's requested scope.
- **Hands-on project delivery** — work is performed directly by senior consultants, not outsourced.
- **Clear, defensible methodology** aligned with best practices and transparent to leadership and employees.
- **Strong communication** with City leadership, department heads, and staff during data collection and review.

Summary of Qualifications

Synergized HR is a woman-owned, veteran-owned human resources consulting firm specializing in public-sector classification and compensation studies, job analysis, and organizational HR modernization. With more than 20 years of progressive HR leadership experience — including direct experience leading a full compensation study for a public-sector special district — our firm brings the technical expertise and practical public-administration understanding required to complete a project of this scope.

Our senior consultant, Jackie Kennedy, SHRM-SCP, personally leads all analytical components of each engagement, including job analysis, survey design, market benchmarking, internal equity modeling, salary structure development, and recommendations. This ensures the City receives consistent, high-quality, senior-level deliverables throughout the entire process.

Synergized HR offers the City:

- **Public-sector classification and compensation experience** including leading a full compensation study for Centennial Water & Sanitation District.
- **Direct expertise with job analysis and job description modernization**, including large-scale restructuring and ADA-aligned documentation.
- **Strong data modeling and analytical capability**, producing clear, defensible, and easy-to-present findings for leadership and City Councils.
- **A streamlined, senior-led project team**, ensuring quality, responsiveness, and accountability from kickoff to final report.
- **Experience with publicly funded, federally funded, and government-regulated organizations**, reinforcing our knowledge of compliance-driven environments.
- **Transparent, collaborative communication** with leadership and staff to support buy-in and project success.

This combination of public-sector HR experience, compensation expertise, and hands-on senior-level involvement positions Synergized HR as a highly capable partner for the City of Independence's Classification & Compensation Study.

Relevant Experience & Comparable Projects

Below is a selection of projects demonstrating our firm's capacity to perform a full classification and compensation study for the City of Independence.

1. **<u>Southeastern Colorado Water Conservancy District (SECWCD)</u>**

   Comprehensive Salary/Benefits Study & HR Analysis

   Public-sector water conservancy district

Synergized HR completed a full salary study for the Southeastern Colorado Water Conservancy District, including market benchmarking, internal equity review, compensation structure development, job documentation assessment, and HR analysis. Deliverables included a comprehensive compensation report, salary structure recommendations, fiscal impact modeling, and staff/Board presentations to support implementation.

Relevance to Independence: Highly comparable to a municipal classification and compensation study. Work included similar scope, public-sector governance, full-market analysis, compensation structure design, and presentation of findings to leadership.

2. Centennial Water & Sanitation District / Highlands Ranch Metro District (CO)

Comprehensive Compensation Review & Planning
Public-sector special district

Led the district's first full compensation study, including market benchmarking for all positions, internal equity analysis, salary structure revision, and compensation planning recommendations. Work included job documentation review, analysis of comparable public entities, and Board-level communication of results.

Relevance to Independence: Mirrors the City's required scope — public-sector roles, full market review, pay plan recommendations, and stakeholder communication.

3. Health Research, Inc. (New York)

Job Analysis, Compensation Review & Minimum Qualifications Framework
Government-funded public health infrastructure organization

Conducted classification analysis, job description modernization, minimum qualifications mapping, compensation review, and internal alignment analysis. Supported organization-wide standardization across decentralized departments for 271+ job titles.

Relevance: Demonstrates capacity to update job documentation, ensure consistency, and evaluate pay across a large, diverse organization.

4. Early Learning Coalition (Florida)

Classification, HR Policy, and Compensation Support
Publicly funded nonprofit serving children and families

Provided ongoing HR consulting including compensation benchmarking, job description development, organizational structure recommendations, and policy modernization within a state-regulated, publicly funded environment.

Relevance: Shows municipal-style public funding context and HR modernization experience.

5. Region XII Migrant & Seasonal Head Start (FHI 360)

HR Consulting, Workforce Support & Training
Federally funded program

Supported multi-state workforce programs, job documentation, HR systems, training, and employee-level analysis. Worked directly with federally funded workforce administrators and operational leadership.

Relevance: Demonstrates work with public-sector federal funding structures, compliance requirements, and multi-department job analysis.

6. **Arconic Aerospace (IN)**

Compensation Analysis & Workforce Planning

Conducted salary benchmarking, compensation data analysis, job documentation review, and workforce planning support across multiple operational sites.

Relevance: Strengthens demonstration of large-scale compensation analysis and data modeling capability.

7. **Leprino Foods Company (National)**

Multi-site Job Analysis, HR Metrics, and Pay/Data Standardization

Executed HR projects for nine facilities, including job analysis, compensation-related data evaluation, job documentation updates, and policy standardization.

Relevance: Demonstrates ability to work across complex, multi-department structures with high accuracy and consistency.

Project Team

Synergized HR will assign a focused, senior-led project team to complete the City of Independence's Classification & Compensation Study. The team is intentionally streamlined to ensure high accountability, clear communication, and direct delivery by experienced personnel.

Jackie Kennedy, SHRM-SCP — Project Lead & Principal Consultant

Role: Leads 100% of the analysis, compensation modeling, job evaluation, recommendations, report writing, and presentations.

Jackie will serve as the City's primary point of contact and will oversee all aspects of the project, including:

- Designing and administering the classification/job analysis process
- Reviewing and validating all job documentation
- Conducting the full compensation market study and data modeling
- Developing salary structures and internal equity analysis
- Preparing the draft and final reports
- Presenting findings to City leadership, staff, and/or Council
- Ensuring deliverables meet project timelines and City expectations

Qualifications:

- SHRM-SCP (highest certification offered by SHRM)
- 20+ years of progressive HR leadership experience
- Former HR Director for a Colorado public-sector special district
- Led full public-sector compensation study (Centennial Water & Sanitation District)
- Extensive experience with job analysis, market benchmarking, pay plans, and implementation
- Lean Six Sigma Green Belt (process improvement)
- Public speaking & facilitation certified (for Council/leadership presentations)

Jackie's direct involvement ensures the City receives senior-level expertise throughout the entire study.

Chelsea Burke — HR Analyst & Project Support

Role: Provides analytical and administrative support under direct supervision of the Project Lead.

Chelsea will support the project by:

- Administering and organizing employee job questionnaires (PAQs)
- Assisting with job description formatting and document organization
- Collecting and compiling benefits information and market data
- Maintaining the project database and ensuring data accuracy
- Preparing draft tables, comparison summaries, and documentation
- Coordinating communication with City HR staff during information requests

All analytical interpretations, modeling, recommendations, and final report elements will be completed and approved by the Project Lead.

Qualifications:

- Strong HR operations and data management experience
- Workforce development and training facilitation background
- Skilled in documentation, research, tracking, and administrative project support
- Experienced working with public- and education-sector clients
- Highly detail-oriented, organized, and responsive

Chelsea ensures structured data flow and efficient documentation, allowing the Project Lead to focus on senior-level analysis and recommendations.

Part C – Project Approach & Work Plan

Synergized HR approaches compensation and classification studies through a structured, transparent, and collaborative methodology that aligns with best practices in public-sector human resources administration. Our work plan mirrors the four major phases outlined in the City of Independence's RFP and is designed to ensure accuracy, defensibility, and clarity at every step. The process emphasizes strong communication, rigorous analysis, and practical application so that the resulting system is both modern and sustainable for long-term use.

Understanding of the Project

The City seeks a comprehensive review and modernization of its classification and compensation system, including a full inventory and update of job descriptions. The goals include ensuring internal equity, improving external competitiveness, supporting fiscal sustainability, and establishing a clear structure that can be easily communicated and maintained. Our understanding is that the City requires a consultant capable of developing a classification system that is logical and consistent, a pay structure aligned with market realities, and implementation guidance that recognizes operational and budgetary impacts.

Synergized HR's methodology and experience align directly with these needs. Our approach balances quantitative and qualitative analysis, integrates staff input, incorporates a defensible job evaluation methodology, and includes a comprehensive market study that captures both salary and total rewards. We also understand the importance of clear, clean documentation for long-term administration, which will guide the development of all job descriptions and policy recommendations.

PHASE I — PROJECT INITIATION & ORIENTATION

The project will begin with a structured orientation intended to establish communication expectations, confirm the project plan, and review existing documentation. We will meet virtually or onsite with the City Manager and key staff to finalize the project timeline, define points of contact, and review any considerations related to departmental operations, labor market factors, or prior compensation structures.

Synergized HR will conduct a thorough review of current job descriptions, organizational charts, pay plans, personnel policies, and any other related documents provided by the City. This review serves as a foundation for understanding existing structures and identifying potential areas of inconsistency, gaps in documentation, or outdated content.

A communication plan will be developed with the City to guide how and when project updates are shared with leadership, supervisors, employees, and other stakeholders. This ensures transparency, builds trust, and sets the stage for successful participation in the job analysis process.

PHASE II — CLASSIFICATION & JOB ANALYSIS

This phase focuses on gathering detailed information about the City's positions using a combination of structured tools and personal engagement. Synergized HR will deploy a Position Analysis Questionnaire (PAQ) customized to the City's operational structure. The PAQ captures essential functions, job duties, required knowledge and abilities, decision-making authority, supervision levels, working conditions, and other job-related factors.

Interviews will then be conducted with department heads, supervisors, and sample employee groups. These discussions provide qualitative context not always captured in written tools and help us understand how work is organized, where positions overlap, and where distinctions should be clarified.

The information collected from the PAQs and interviews will be used to produce new job descriptions for every position in the City. All job descriptions will be written in a consistent, ADA-compliant format and will include essential functions, minimum qualifications, KSAs, and physical and environmental requirements. This process ensures that the City obtains clear, modern, legally defensible documentation for ongoing use.

Following job documentation, Synergized HR will conduct a job evaluation analysis using an objective methodology that considers responsibility, complexity, knowledge requirements, impact, and working conditions. Positions will be placed into a logical classification structure with clear job families and progression pathways. FLSA status will also be reviewed, and determinations will be supported with written justification.

PHASE III — COMPENSATION & BENEFITS ANALYSIS

Synergized HR will work with City leadership to refine or establish a formal compensation philosophy. This discussion will help determine the City's desired market position and guide subsequent pay structure recommendations.

Once the philosophy is established, we will identify comparable organizations for the market survey, ensuring a representative mix of municipalities and relevant public or private employers. After approval from the City, Synergized HR will conduct a comprehensive market study that captures minimums, midpoints, maximums, and total compensation values, including key benefits such as insurance structures, retirement plans, paid leave, and other offerings.

We will compare the City's current pay and benefits against market findings and identify where the City leads, lags, or aligns with peers. This analysis will include internal equity and salary compression evaluations, particularly where tenure, job families, or legacy structures may be contributing to inconsistencies.

Findings from these analyses will be used to develop a recommended salary structure with defined ranges, suggested placement of each classification, and practical guidelines for hiring rates, promotional adjustments, reclassifications, and movement through the ranges.

PHASE IV — FINAL REPORTING & IMPLEMENTATION

Synergized HR will prepare a comprehensive final report that summarizes methodology, data findings, classification outcomes, market analysis, and all recommended salary structures. Job descriptions will be delivered in fully editable formats, and all market data will be provided to ensure transparency.

An implementation strategy will be created that includes a position-by-position fiscal impact analysis and at least two cost scenarios to support the City's budgeting considerations. These scenarios will balance competitiveness, internal equity, and financial feasibility.

Synergized HR will present the findings to City leadership and will provide a formal presentation to the City Council. We will also train designated staff to administer the new classification and compensation system, ensuring long-term manageability and continuity.

PROJECT SCHEDULE

Phase	Activities	Timeline	Milestone / Deliverable
Phase 1: Project Initiation & Data Collection	Kickoff meeting, data request, document review, distribution of job questionnaires (PAQs)	**Jan 19 – Feb 2, 2026**	Project Plan & Data Request Finalized
Phase 2: Job Analysis & Job Description Review	PAQ review, job analysis interviews, classification review, updated job description drafts, FLSA review	**Feb 3 – Mar 6, 2026**	Draft Job Descriptions Delivered
Phase 3: Market Study & Internal Equity Analysis	Market salary survey, benefits comparison, internal equity/compression analysis, salary structure development	**Mar 9 – Apr 17, 2026**	Preliminary Compensation Findings
Phase 4: Final Report & Implementation Planning	Draft/final report preparation, leadership review meetings, implementation options, Council/leadership presentations	**Apr 20 – May 15, 2026**	Final Compensation Report Delivered

Part D – References

Reference 1
Client Name: Arconic Aerospace
Contact Person & Title: Joe Lentini, HR Leader
Phone: (224) 833-6418
Email: lentini@younginnovations.com
Brief Description of Project:
Joe Lentini can speak to Jackie Kennedy's compensation management, benefits administration, and HR analytics work in a complex manufacturing environment.

Reference 2
Client Name: KAS Consulting Group
Contact Person & Title: Keith Scott, Principal Consultant
Phone: (214) 683-6417
Email: keith@consultingkas.com
Brief Description of Project:
Keith Scott is an HR and organizational development consultant who has partnered with Synergized HR on various client engagements. He can speak to Jackie Kennedy's compensation analysis methodology and project delivery.

Reference 3
Client Name: Leprino Foods Company & Molson Coors Beverage Company
Contact Person & Title: Emily Clift (Clark), Senior HR Leader
Phone: (270) 223-7247
Email: emilycclark19@gmail.com
Brief Description of Project:
Emily Clift (Clark) worked with Jackie Kennedy at both Leprino Foods and Molson Coors. She can speak to Jackie's work in compensation, employee development, and HR leadership in large-scale organizational environments.

Part E – Sealed Cost Proposal (Separate Document)

Sealed and submitted separately from main technical proposal per RFP guidelines.

Appendix C: Proposal Submittal Form

Instructions: This form should be completed and submitted with your proposal package. Its purpose is to ensure all required components are included and to provide key information in a standardized format.

Section 1: Proposing Firm Information

Official Firm Name:	Synergized HR, LLC.
Mailing Address:	PO Box 630620 Highlands Ranch, CO 80163
Website:	SynergizedHR.com
Year Firm Established:	2023
Office Location Performing the Work:	543 James St. Highlands Ranch, CO 80126
Primary Contact Person:	Jackie Kennedy
Title:	Owner/CEO
Phone:	303-968-8681
Email:	jackiekennedy@synergizedHR.com

Section 2: Proposal Submission Checklist

Use this checklist to verify that all required elements are included in your proposal submission.

- [ ] **One (1) unbound original, five (5) bound copies, and one (1) electronic copy (USB flash drive) of the technical proposal.**
- [ ] **One (1) sealed envelope containing the Cost Proposal** , clearly marked on

JACKIE KENNEDY

SHRM-SCP CERTIFIED SENIOR HUMAN RESOURCES LEADER

JackieKennedy@SynergizedHR.com

303.968.8681

Denver, CO

https://www.linkedin.com/in/hrleaderandstrategicpartner/

SKILLS

- Process Improvement
- Technical Writing
- Learning & Development
- Project Management
- Workforce Planning
- Compliance & Risk Management
- Organizational Effectiveness
- Compensation & Total Rewards
- Training Program Design/Implementation
- Multi-Site Leadership
- Organizational Development
- Policy Writing
- Change Management
- Employment Law & Ethics
- Labor & Employee Relations
- HRIS Implementation & Mgmt.

US NAVY VETERAN – Honorable Discharge

SUMMARY

Strategic Human Resources Executive with extensive experience driving HR initiatives and providing leadership across diverse industries, including healthcare, manufacturing, and construction. Adept at navigating complex union and non-union environments with a proven track record of aligning HR strategies with business goals to enhance organizational performance and culture. Recognized for delivering innovative education and organizational development programs, fostering leadership development, and cultivating high-performing teams to achieve measurable organizational outcomes.

PROFESSIONAL EXPERIENCE

Owner/Principal HR Consultant — December 2023 - Current
Synergized HR, Denver, CO

- Leads the development and implementation of comprehensive HR solutions for diverse clients, improving organizational efficiency and employee engagement.
- Designs and delivers leadership development programs to enhance organizational capacity and achieve strategic outcomes.
- Leads full compensation projects such as benchmarking, studies and planning.
- Provides expert guidance on HR compliance and best practices, ensuring adherence to federal, state, and local employment laws for multiple states.
- Authors employee handbooks, policies, and standard operating procedures, fostering consistent and transparent organizational practices.
- Partners with clients to develop comprehensive training and education programs, increasing employee performance and satisfaction.
- Conducts comprehensive HR audits, identifying areas for improvement and delivering actionable recommendations to enhance operational effectiveness.

HRBP Manager — June 2023 - February 2024
Molson Coors Beverage Company, Golden, CO *(Injury/Surgery)*

- Led the design and implementation of Molson Coor's own internal temp agency.
- Established procedures to analyze trends and develop workforce plans to resolve issues and make a positive impact on business results.
- Designed and implemented engagement initiatives and communication programs to support employee development and drive organizational excellence.
- Developed, coordinated, and implemented employee engagement initiatives, communication, and events with supervisors, HRBP's and managers.
- Managed day-to-day HR duties to include progressive discipline, development & coaching, recruitment, etc.

HUMAN RESOURCES DIRECTOR & MANAGER — August 2021 - May 2023
Highlands Ranch Metro District / Centennial Water & Sanitation District / HRCA, Highlands Ranch, CO *(Position eliminated due to restructuring)*

- Designed and implemented Internship Program, partnering with local colleges and universities.
- Developed and led educational programs on DE&I and Mental Health Awareness, fostering an inclusive workplace culture and measurable engagement improvements.
- Completed compensation review and planning, the first at the organization.
- Developed over 50 policies and procedures, HR Metrics, and directed ATS system implementation.
- Designed and facilitated the first Employee Engagement Survey in several years, leading to a reshaping of company culture.

EDUCATION & CERTIFICATIONS

Masters
Human Resource Management

Bachelor of Science
Social Psychology

SHRM-SCP
Society of Human Resource Management (SHRM)

HRCP Certifications
Employee Benefits & Compensation
Labor Relations
Learning & Development
Organizational Theory & Design
Organizational Communication
Employee Relations & Life Cycle
Organizational Learning

Public Speaking & Facilitation
Certificate

Lean Six Sigma – Green Belt
Lean Six Sigma Council

TECHNICAL SKILLS

Adobe Pro

Paycom, ADP Workforce, Paychex, Ceridian/DayForce, Kronos, Gusto, Rippling, Bamboo HR, Dover, Wellfound

MS Office (Project, Excel, Word, PowerPoint)

SAP/SuccessFactors

iCIMS, Oracle, Timberline

Tableau, ClickUp, FreshBooks

VOLUNTEER EXPERIENCE

SHRM NATIONAL
SME for Testing Design Board
Mental Health Ally – Certified

MILE HIGH SHRM
Education Committee

SHRM FOUNDATION
Team Empower
Advocacy Team

HR PROJECT MANAGER — November 2019 - August 2021
Leprino Foods Company, Denver, CO *(Pandemic)*

- Executed a multitude of HR related projects for nine U.S. based manufacturing plants, as sole Project Manager.
- Collaborated with German-based company to design, build, test, and roll-out HRIS system across all facilities, also leading change management process.
- Responsible for all COVID related policies, procedures & guidelines, to include vaccination clinics at all plants (set up, contracting medical professionals, etc.).
- Designed HR metrics dashboard, producing detailed data analytics.
- Led multiple process improvement initiatives across all U.S. based locations.
- Designed and implemented change management strategies, including training programs for 9 U.S.-based manufacturing facilities, resulting in streamlined operations and increased employee adoption of new systems.

HUMAN RESOURCES MANAGER — October 2018- July 2019
Arconic Aerospace, LaPorte, IN *(Relocated to Colorado)*

- Delegated to team of four accountability of stellar HR & payroll support to two plants and one logistics facility.
- Shifted company culture through various means and built trust of HR department and staff.
- Effectively swayed staff from petition to unionize via culture change & communication, petition was rescinded.
- Managed, “Hiring Blitz” to hire 30+ additional workers per week, leading to calibration of onboarding process.

PLANT HR & HRIS MANAGER — November 2017 - October 2018
INOAC Manufacturing, Bardstown, KY & Moonachie, NJ *(Relocated to Michigan)*

- Managed centralized payroll and HRIS system for North America based manufacturing plants, ensuring system was fully utilized (KY & NJ)
- Provided guidance & oversight of unionized facilities, and renewal of collective bargaining agreement.
- Conducted SWOT analysis of turnover and training, restructuring training program and reducing turnover 30%.
- Managed safety personnel, communicating with owners in Japan on issues and resolutions.

HUMAN RESOURCES DIRECTOR — July 2016 - October 2017
Kenpat Construction & Manufacturing, Apopka, FL *(Restructuring/Lay-off)*

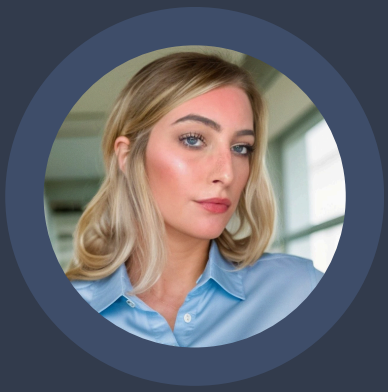
- Conducted gap analysis communicating needs based on findings, leading to multiple process improvements.
- Spearheaded the creation of competency-based assessment tools to enhance employee performance and identify growth opportunities.
- Designed a new job description system including job survey, essential functions, and job analysis.
- Developed, “Total Compensation” package to bring awareness of full value of employment reducing turnover, managed payroll department.
- Spearheaded the creation of a competency assessment tool designed to coach and improve performance.

HUMAN RESOURCES DIRECTOR — August 2012 - June 2016
Press, Inc, Jacksonville, FL *(Owner retired and closed business)*

- Assisted in developing the company’s first web-based automated time keeping system, reducing payroll errors.
- Ensured compliance of federally awarded projects, to include certified payroll.
- Created, designed and managed 30, 60, and 90-day onboarding process reducing turnover.
- Reconfigured open-enrollment process & implemented wellness fair increasing employee participation by 35%.

Chelsea Burke

Training Facilitator



Contact

Chelsea@synergizedhr.com

720.610.2465

Denver, CO

synergizedhr.com

Education

Bachelor of Science - Anthropology

University of Louisville

2023

Associate of Arts

University of Central Florida (UCF)

2015

Skills

- Full-Cycle Recruiting & Screening
- Social media marketing
- Talent Pipeline Management
- Candidate Experience Advocate
- Confidential HR File Management
- Marketing & Development
- Candidate Database Management
- Highly Tech Proficient
- Job Description & SOW Development
- Policy & Document Development
- Compliance
- Operations Management

Professional Summary

Trainer & Program Support Specialist with experience in human resources, healthcare, and recruiting. Currently supports the delivery of job readiness workshops, resume development, and participant communications for workforce development clients. Skilled in coordinating virtual and in-person training logistics, facilitating soft skills sessions, and providing individualized support to jobseekers from diverse backgrounds. Brings a calm, engaging presence to every session and is passionate about helping individuals prepare for sustainable employment opportunities. She is well-versed in supporting adult learners in virutal envrionmentsand has contributed to curriculum delivery for public and education sector clients.

Work Experience

Denver, CO | Dec 2023 - Present

Synergized HR - Trainer & Program Support

- Co-facilitate virtual and in-person workshops on resume writing, workplace etiquette, LinkedIn branding, and job re-entry for dislocated workers and adult learners.
- Coordinate session logistics including calendar management, digital materials, and attendance tracking.
- Provide 1:1 participant follow-up on resume revisions, interview preparation, and onboarding support.
- Support curriculum development for job readiness programs, helping align content with WIOA and adult learning principles.

Louisville, KY | 2021-2024

University of Colorado Health/Quest Dignostics/Sky Ridge Medical Center

Medical Assistant/Lab Lead

- Served in fast-paced medical roles requiring communication, organization, and precision under pressure.
- Managed scheduling and documentation for lab patients and clinical staff.
- Demonstrated reliability and attention to detail in handling time-sensitive, confidential data.

Louisville, KY | 2019-2021

25 Again by Body Shapes Medical (Startup)- *HR Assistant*

- Facilitated onboarding processes, tracked leave documents, and maintained digital HR files.
- Supported HR leadership with benefits administration and basic compliance workflows.

Louisville, KY | 2018-2019

Canoe (Startup) - *Brand Operations Manager*

- Oversaw backend operations and retail staffing strategy, coordinating product flow and team scheduling.
- Responded to customer concerns/inquiries.
- Ensured brand reputation was upheld, monitoring social media.

Orlando, FL | 2016-2018

Total HR (Now Synergized HR) - *HR/Recruiting Assistant*

- Supported sourcing and initial outreach for contract and full-time positions.
- Screened resumes, scheduled interviews, and pre-qualified applicants.
- Assisted with administrative HR tasks including updating contact databases and maintaining filing systems.
- Assisted with marketing and development.

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	10-Year CIP

DISCUSSION:

Attached is the combined 10-year Capital Improvement Plan (CIP) representing our coordinated strategic vision for Fiscal Years 2027 through 2037. This document addresses critical infrastructure needs that have reached the end of their useful life while positioning the community for future growth.

The plan outlines a total projected investment of approximately $102.5 million over the next decade. It is defined by two "Megaprojects" that dominate the financial landscape: the mandated Wastewater Treatment Plant (WWTP) replacement ($50 million) and the reconstruction of 1st Street West ($19 million). Beyond these headlines, the plan focuses on four strategic goals: infrastructure reliability, public safety modernization, operational efficiency, and quality of life.

Key components of the plan include:

- **Public Safety Facilities & Equipment:** We must address a facility crisis within the Fire Department. The plan programs a Fire Station Expansion/Relocation for FY 2027/2028 ($6 million) to resolve space constraints that currently hinder equipment replacement cycles. This expansion enables the subsequent purchase of a replacement Ladder Truck in FY 2032.
- **Fleet Modernization:** To prevent operational collapse in the Streets Department, we have incorporated a rigorous fleet replacement schedule. This includes a split-payment strategy for heavy dump trucks to smooth the cash flow impact on our budget.
- **Utility Maintenance:** While the WWTP is a non-negotiable state mandate, we are also prioritizing the collection system by accelerating the purchase of a Combination Jet/Vac Truck to FY 2027 to prevent backups and maintain sewer mains.
- **Quality of Life:** We are leveraging Hotel/Motel Tax revenues to fund improvements at the Aquatic Center, Falcon Civic Center, and parks. This ensures community assets are maintained without drawing heavily from property tax levies.

It is important to point out that this is a working document. While every attempt has been made to ensure accurate placement of projects and funding sources, we must review the document closely to ensure nothing has been missed. Additionally, this is a "living document." We expect it to be updated and modified periodically to bring on new projects or reallocate resources as conditions change.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

10 Year Capital Improvement Plan (CIP)

Fiscal Years 2027 – 2037
City of Independence, Iowa
Prepared For: City Council Work Session
Subject: 10-Year Strategic Infrastructure & Capital Investment Strategy

1. Executive Summary

This 10-Year Capital Improvement Plan (CIP) represents a coordinated strategic vision for the City of Independence from Fiscal Year 2027 through 2037. The plan addresses critical infrastructure needs that have reached the end of their useful life while positioning the community for future growth.

This plan marks a shift from reactive repairs to **predictable asset management**. By systematically replacing infrastructure before it fails, specifically the $50M Wastewater Treatment Plant and our heavy fleet, we protect the City's bond rating and ensure intergenerational equity. The upcoming decade is defined by two 'Megaprojects': the mandated **Wastewater Treatment Plant Replacement ($50M)** and the reconstruction of **1st Street West ($19.6M)**. These are not merely expenses; they are the baseline investments required to support Independence's residential and industrial growth for the next half-century.

Total Projected Investment (2027-2037): ~$97.1 Million (Estimated)

Strategic Goals

- **Infrastructure Reliability:** Replacing aging underground utilities and treatment facilities before failure.
- **Public Safety Modernization:** Ensuring Fire and Police departments have adequate facilities and reliable apparatus.
- **Operational Efficiency:** Proactively replacing fleet vehicles to reduce downtime and maintenance costs in the Streets and Utilities departments.
- **Quality of Life:** Enhancing parks, library, and airport assets to retain residents and attract tourism.

2. Financial Overview by Department

We have structured the capital needs by department over the planning period. Utilities (Water/Sewer) comprise the majority of the spending due to the WWTP project. However, the General Fund departments (Police, Fire, Streets) face significant pressure to modernize fleets and facilities.

Funding Strategy

- **GO Bonds:** Utilized for long-life assets like the Fire Station and major Street reconstruction.
- **Enterprise Funds:** Water and Sewer rates will support utility projects and equipment.
- **Grants:** Aggressive pursuit of FAA (Airport), RISE/BUILD (Streets), and SRF (Sewer) funds is assumed.
- **Road Use Tax (RUT):** Will primarily fund the newly integrated Street Department fleet replacement schedule.
- **Hotel/Motel Tax:** Dedicated largely to Quality of Life projects. **Per Iowa Code Chapter 423A.7**, at least **50%** of revenues derived from this tax must be spent on the acquisition, construction, improvement, or maintenance of recreation, convention, cultural, or entertainment facilities. The remaining revenues may be spent on any city operations authorized by law. Our plan leverages the restricted portion for Park amenities and Civic Center improvements, ensuring these community assets are maintained without drawing heavily from property tax levies.

3. Departmental Analysis

A. Fire Department

Primary Focus: Facility Expansion and Apparatus Rotation.
The current station cannot house modern aerial apparatus. We have programmed the Fire Station Expansion/Relocation for FY 2027/2028 ($6M). This enables the subsequent purchase of Ladder 1 in FY 2032.

B. Police Department

Primary Focus: Vehicle Rotation and Equipment.
We maintain a steady rotation of patrol vehicles to ensure officer safety and minimize maintenance costs on high-mileage units.

C. Streets & Public Works

Primary Focus: 1st Street West, Lovers Lane Replacement, and Fleet Modernization.
While the 1st Street West project is the headline item, with a secondary road project (Lovers Lane) in FY2032, we have incorporated a rigorous fleet replacement schedule to ensure our crews can effectively clear snow and maintain roadways.

Key Fleet Investments:
To prevent a collapse in operational capacity, we have programmed a specific rotation of dump trucks and light-duty vehicles. Notably, we are utilizing a **split-payment strategy** for heavy dump trucks. This financing tool allows us to flatten the capital expenditure 'spikes' that typically drain our reserves, preserving our Road Use Tax (RUT) cash-on-hand for its primary purpose: purchasing salt, sand, and asphalt for immediate seasonal maintenance.

- **FY 2027:** 1-Ton Truck replacement.
- **FY 2028-2031:** Systematic replacement of Dump Trucks #13 and #20, alongside skid loaders and push blades, and purchase of road resurfacing equipment.
- **FY 2032-2037:** Continuation of the heavy equipment cycle, including End Loaders and additional dump trucks.

D. Utilities (Water & Sewer)

Primary Focus: Regulatory Compliance and System Maintenance.
The WWTP project is non-negotiable due to IDNR mandates. However, we must also maintain the collection system. Consequently, we have accelerated the purchase of the Combination Jet/Vac Truck to FY 2027. This equipment is vital for preventing backups and maintaining the longevity of our sewer mains. Additionally, we have moved the Lovers Lane Lift Station Generator to FY 2029 to ensure power redundancy at that critical lift point.

E. Airport, Parks, & Library

Primary Focus: Maintenance and Amenities.
Investments here are targeted at maintaining current assets (Replacing flooring and doors at the Library, Runway lighting at the Airport, and Park shelters in Parks & Recreation) with one major expansion planned for the Airport (Large Hangar) in the out-years. We have also integrated a granular maintenance schedule for the Aquatic Center and Falcon Civic Center to prevent deferred maintenance backlogs.

4. 10-Year Project Roadmap (FY 2027 – 2037)

The following timeline breaks down major capital expenditures by Fiscal Year.

FY 2027

- **Fire:** Fire Station Engineering & Land Acquisition Phase ($1M)
- **Library:** Flooring & Door Replacement ($70,000)
- **Sewer:** WWTP Construction Begins ($50M total spread over 3 years)
- **Streets (Major):** 1st Street West Reconstruction (Phase 1) Engineering ($2,140,000)
- **Streets (Fleet):** 1-Ton Truck with Dump Box ($70,000)
- **Utilities:** Combination Jet/Vac Truck ($450,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2028

- **Fire:** Fire Station Construction ($5M)
- **Sewer:** WWTP Construction Continues (Year 2)
- **Streets (Major):** 1st Street West Reconstruction (Phase 2) Construction ($17,500,000)
- **Streets (Fleet):** 3/4 Ton Truck with Tommy Gate ($60,000)
- **Streets (Fleet):** Dump Truck #13 Replacement (Installment 1: $87,500)
- **Airport:** Runway Lighting Rehabilitation ($400k - 90% FAA Grant)
- **Police:** Patrol Vehicle Replacement Cycle ($60,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2029

- **Sewer:** WWTP Construction Continues (Year 3)
- **Utilities:** Lovers Lane Lift Station Generator ($60,000)
- **Streets (Fleet):** 3/4 Ton Truck with Tommy Gate ($60,000)
- **Streets (Fleet):** Dump Truck #13 Replacement (Installment 2: $87,500)
- **Streets (Fleet):** Push Blade ($35,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2030

- **Library:** Furniture Refresh, Exterior Painting ($120,000)
- **Streets (Fleet):** 1/2 Ton Truck ($60,000)
- **Streets (Fleet):** Dump Truck #20 Replacement (Installment 1: $87,500)
- **Parks:** Complex Parking Lot Resurfacing
- **Police:** Patrol Vehicle Replacement Cycle ($60,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2031

- **Admin:** City Hall Remodel / Reconfiguration (Post-Fire Station Move) ($1,500,000)
- **Streets (Fleet):** Dump Truck #20 Replacement (Installment 2: $87,500)
- **Streets (Fleet):** Skid Loader ($70,000)
- **Streets (Fleet):** Road Resurfacing Equipment ($225,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2032

- **Fire:** Ladder 1 Replacement ($3M)
- **Streets (Major):** Lovers Lane Replacement Project ($3,500,000)
- **Streets (Fleet):** End Loader (Installment 1: $150,000)
- **Library:** Park Improvements ($50,000)
- **Police:** Patrol Vehicle Replacement Cycle ($60,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2033

- **Parks:** Gymnasium Addition ($1M)
- **Streets (Fleet):** End Loader (Installment 2: $150,000)
- **Streets (Fleet):** 3/4 Ton Utility Truck ($80,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2034

- **Streets (Fleet):** Dump Truck CK/Sander (Installment 1: $87,500)
- **Streets (Fleet):** 3/4 Ton Utility Truck ($80,000)
- **Airport:** T-Hangar Maintenance
- **Parks:** Gym Floor ($75,000), Paint/Caulk ($60,000), Mower ($13,000), Fence/Shelter ($65,000)
- **Police:** Patrol Vehicle Replacement Cycle ($60,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2035

- **Fire:** Fire Engine 1 Replacement ($1.5M)
- **Streets (Fleet):** Dump Truck CK/Sander (Installment 2: $87,500)
- **Streets (Fleet):** 1-Ton Truck ($80,000)
- **Parks:** Mower/Spade ($30,000), Shed Exp. ($50,000), Drop Slide ($25,000), Parking Lot Chip Seal ($20,000), Playground Surfacing/Ice Rink Hut ($100,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2036

- **Airport:** Large Hangar Construction ($1.57M)
- **Streets (Fleet):** Dump Truck CK #6D (Installment 1: $87,500)
- **Streets (Fleet):** 3/4 Ton Truck ($65,000)
- **Police:** Patrol Vehicle Replacement Cycle ($60,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

FY 2037

- **Streets (Fleet):** Dump Truck CK #6D (Installment 2: $87,500)
- **Streets (Fleet):** 3/4 Ton Truck ($65,000)
- **Utilities:** Sewer Main Lining/Cleaning/Replacement Program ($200,000)
- **Utilities:** Water Main Replacement Program ($300,000)

5. Critical Dependencies & Risks

1. **Fire Station / City Hall Domino Effect: Facility Sequencing:** The City Hall Remodel ($1.5M) is strategically sequenced to follow the Fire Department's move. By relocating the Fire Department to a purpose-built facility in FY 2028, we unlock a few of the existing fire bays for administrative expansion. This 'Domino Strategy' allows us to modernize City Hall within its existing footprint, avoiding the significantly higher cost of constructing a new administrative building from scratch.
2. **Grant Reliance (BUILD):** The 1st Street West project is heavily dependent on the success of the second BUILD grant application. Failure to secure this would require significant rescheduling of Street priorities.
3. **WWTP Financing:** With the cost updated to $50M, this single project consumes over 50% of the 10-year capital budget. Careful management of sewer rates and debt service is required to ensure this does not crowd out other General Fund priorities like the Fire Station.

6. Conclusion

This Capital Improvement Plan is an ambitious but necessary roadmap. While the $97.1M figure is substantial, it prioritizes the 'unseen' infrastructure that supports the city's economic existence. The investment in the Wastewater Treatment Plant, for instance, does more than satisfy a DNR mandate, it secures the capacity required to welcome new industry and housing developments. By approving this strategic direction, the Council empowers Staff to secure the necessary grants and financing to build a resilient Independence.

Fiscal Year	Department	Project Description	GO Bonds	Enterprise Funds (Water/Sewer)	Grants (Fed/State)	Road Use Tax (RUT)	Hotel/Motel Tax	General Fund / Other	Total Estimated Cost
2027	Fire	Fire Station Engineering & Land Acquisition	$ 1,000,000.00	$ -	$ -	$ -	$ -	$ -	$ 1,000,000.00
2027	Library	Flooring & Door Replacement	$ -	$ -	$ -	$ -	$ 70,000.00	$ -	$ 70,000.00
2027	Sewer	WWTP Construction (Year 1 Allocation)	$ -	$ 16,666,666.67	$ -	$ -	$ -	$ -	$ 16,666,666.67
2027	Streets	1st Street West Reconstruction (Phase 1 - Est) Engineering	$ 750,000.00	$ -	$ 1,390,000.00	$ -	$ -	$ -	$ 2,140,000.00
2027	Streets	1-Ton Truck with Dump Box	$ -	$ -	$ -	$ 70,000.00	$ -	$ -	$ 70,000.00
2027	Utilities	Combination Jet/Vac Truck [Accelerated]	$ -	$ 450,000.00	$ -	$ -	$ -	$ -	$ 450,000.00
2027	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2027	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2028	Fire	Fire Station Construction	$ 5,000,000.00	$ -	$ -	$ -	$ -	$ -	$ 5,000,000.00
2028	Sewer	WWTP Construction (Year 2 Allocation)	$ -	$ 16,666,666.67	$ -	$ -	$ -	$ -	$ 16,666,666.67
2028	Streets	1st Street West Reconstruction (Phase 2 - Est) Construction	$ -	$ -	$ 17,500,000.00	$ -	$ -	$ -	$ 17,500,000.00
2028	Streets	3/4 Ton Truck with Tommy Gate	$ -	$ -	$ -	$ 60,000.00	$ -	$ -	$ 60,000.00
2028	Streets	Dump Truck #13 Replacement (Installment 1)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2028	Airport	Runway Lighting Rehabilitation	$ -	$ -	$ 360,000.00	$ -	$ -	$ 40,000.00	$ 400,000.00
2028	Police	Patrol Vehicle Replacement	$ -	$ -	$ -	$ -	$ -	$ 60,000.00	$ 60,000.00
2028	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2028	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2029	Sewer	WWTP Construction (Year 3 Allocation)	$ -	$ 16,666,666.67	$ -	$ -	$ -	$ -	$ 16,666,666.67
2029	Utilities	Lovers Lane Lift Station Generator [Accelerated]	$ -	$ 60,000.00	$ -	$ -	$ -	$ -	$ 60,000.00
2029	Streets	3/4 Ton Truck with Tommy Gate	$ -	$ -	$ -	$ 60,000.00	$ -	$ -	$ 60,000.00
2029	Streets	Dump Truck #13 Replacement (Installment 2)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2029	Streets	Push Blade	$ -	$ -	$ -	$ 35,000.00	$ -	$ -	$ 35,000.00
2029	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2029	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2030	Library	Furniture Refresh, Exterior Painting	$ -	$ -	$ -	$ -	$ 120,000.00	$ -	$ 120,000.00
2030	Streets	1/2 Ton Truck	$ -	$ -	$ -	$ 60,000.00	$ -	$ -	$ 60,000.00
2030	Streets	Dump Truck #20 Replacement (Installment 1)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2030	Parks	Complex Parking Lot Resurfacing	$ -	$ -	$ -	$ -	$ 50,000.00	$ -	$ 50,000.00
2030	Police	Patrol Vehicle Replacement	$ -	$ -	$ -	$ -	$ -	$ 60,000.00	$ 60,000.00
2030	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2030	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2031	Admin	City Hall Remodel / Reconfiguration	$ 1,500,000.00	$ -	$ -	$ -	$ -	$ -	$ 1,500,000.00
2031	Streets	Dump Truck #20 Replacement (Installment 2)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2031	Streets	Skid Loader	$ -	$ -	$ -	$ 70,000.00	$ -	$ -	$ 70,000.00
2031	Streets	Road Resurfacing Equipment	$ -	$ -	$ -	$ 225,000.00	$ -	$ -	$ 225,000.00
2031	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2031	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00

Fiscal Year	Department	Project Description	GO Bonds	Enterprise Funds (Water/Sewer)	Grants (Fed/State)	Road Use Tax (RUT)	Hotel/Motel Tax	General Fund / Other	Total Estimated Cost
2032	Fire	Ladder 1 Replacement	$ 3,000,000.00	$ -	$ -	$ -	$ -	$ -	$ 3,000,000.00
2032	Streets	Lovers Lane Replacement Project	$ 3,500,000.00	$ -	$ -	$ -	$ -	$ -	$ 3,500,000.00
2032	Streets	End Loader (Installment 1)	$ -	$ -	$ -	$ 150,000.00	$ -	$ -	$ 150,000.00
2032	Library	Park Improvements	$ -	$ -	$ -	$ -	$ -	$ 50,000.00	$ 50,000.00
2032	Police	Patrol Vehicle Replacement	$ -	$ -	$ -	$ -	$ -	$ 60,000.00	$ 60,000.00
2032	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2032	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2033	Parks	Gymnasium Addition	$ 500,000.00	$ -	$ -	$ -	$ 500,000.00	$ -	$ 1,000,000.00
2033	Streets	End Loader (Installment 2)	$ -	$ -	$ -	$ 150,000.00	$ -	$ -	$ 150,000.00
2033	Streets	3/4 Ton Utility Truck	$ -	$ -	$ -	$ 80,000.00	$ -	$ -	$ 80,000.00
2033	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2033	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2034	Streets	Dump Truck CK/Sander (Installment 1)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2034	Streets	3/4 Ton Utility Truck	$ -	$ -	$ -	$ 80,000.00	$ -	$ -	$ 80,000.00
2034	Airport	T-Hangar Maintenance	$ -	$ -	$ -	$ -	$ -	$ 50,000.00	$ 50,000.00
2034	Parks	Civic Center Gym Floor & Paint	$ -	$ -	$ -	$ -	$ 135,000.00	$ -	$ 135,000.00
2034	Parks	Cemetery Mower & Complex Fencing/Shelter	$ -	$ -	$ -	$ -	$ 78,000.00	$ -	$ 78,000.00
2034	Police	Patrol Vehicle Replacement	$ -	$ -	$ -	$ -	$ -	$ 60,000.00	$ 60,000.00
2034	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2034	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2035	Fire	Fire Engine 1 Replacement	$ 1,500,000.00	$ -	$ -	$ -	$ -	$ -	$ 1,500,000.00
2035	Streets	Dump Truck CK/Sander (Installment 2)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2035	Streets	1-Ton Truck	$ -	$ -	$ -	$ 80,000.00	$ -	$ -	$ 80,000.00
2035	Parks	Equipment (Mower/Tree Spade)	$ -	$ -	$ -	$ -	$ 30,000.00	$ -	$ 30,000.00
2035	Parks	Facilities (Shed/Slide/Lot/Playground)	$ -	$ -	$ -	$ -	$ 195,000.00	$ -	$ 195,000.00
2035	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2035	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2036	Airport	Large Hangar Construction	$ -	$ -	$ 1,413,000.00	$ -	$ -	$ 157,000.00	$ 1,570,000.00
2036	Streets	Dump Truck CK #6D (Installment 1)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2036	Streets	3/4 Ton Truck	$ -	$ -	$ -	$ 65,000.00	$ -	$ -	$ 65,000.00
2036	Police	Patrol Vehicle Replacement	$ -	$ -	$ -	$ -	$ -	$ 60,000.00	$ 60,000.00
2036	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2036	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00
2037	Streets	Dump Truck CK #6D (Installment 2)	$ -	$ -	$ -	$ 87,500.00	$ -	$ -	$ 87,500.00
2037	Streets	3/4 Ton Truck	$ -	$ -	$ -	$ 65,000.00	$ -	$ -	$ 65,000.00
2037	Utilities	Sewer Main Lining/Cleaning/Replacement Program	$ -	$ 200,000.00	$ -	$ -	$ -	$ -	$ 200,000.00
2037	Utilities	Water Main Replacement Program	$ -	$ 300,000.00	$ -	$ -	$ -	$ -	$ 300,000.00

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Strategic Plan

DISCUSSION:

This memo presents the draft 2025 Strategic Plan for City Council review and discussion. This document is the result of the collaborative planning session held on April 26, 2025, involving the Mayor, City Council, and Department Heads. The plan reflects our unified commitment to guiding the city's future by addressing challenges and building upon our strengths, from our natural resources along the Wapsipinicon River to our engaged community.

The proposed plan articulates a vision of balancing resilience with progress. It honors our history as the "Lexington of the North" while fostering a thriving environment for modern businesses and families. The document is organized around six strategic goals that will serve as a framework for our future decision-making:

- **Goal 1:** Support high-quality City Services by ensuring we can handle future growth and supporting employees through adequate resources.
- **Goal 2:** Encourage a supportive environment for businesses and workforce, specifically by creating opportunities for students to learn trades with current employers.
- **Goal 3:** Support and enhance City infrastructure, with a focus on preventing failures, including on key bridges.
- **Goal 4:** Efficient and effective planning of resources to position Independence as a regional hub for Buchanan County.
- **Goal 5:** Promote community involvement by ensuring all voices are heard, catering to both the loudest and quietest voices in our community.
- **Goal 6:** Support tourism and historical sites, integrating tourism as a key component of the city's economic development strategy.

This Strategic Plan is not an end, but a beginning. It acts as the primary guide for our policy-making and budget development. While reviewing this draft does not have an immediate financial impact, the final adopted plan will direct how we prioritize our Capital Improvement Projects (CIP) and allocate resources in future fiscal years. It ensures that our financial stability is pursued through efficient planning.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

2025 Strategic Plan

Introduction

The City of Independence is a progressive and growing community in scenic Northeast Iowa, operating under a Mayor-Council form of government with a population of over 6,000 residents. As the county seat of Buchanan County, Independence serves as a vital hub for the region, balancing small-town appeal with the conveniences of a larger city.

Our community has a rich history, once known as the "Lexington of the North" for its famed horse-racing legacy, and we take immense pride in preserving our historical character through beautifully maintained homes and landmarks. Today, our economy is driven by strong manufacturing, healthcare, and retail sectors.

This Strategic Plan is the result of a collaborative session held on April 26, 2025, with all City Council members and Department Heads. It reflects a unified commitment to guide the city's future by addressing challenges and building upon our strengths, from our natural resources along the Wapsipinicon River to our engaged, philanthropic community. This document will serve as a framework for policy-making and budget development, ensuring we work cohesively toward a shared vision.

Vision, Mission, and Guiding Principles

Vision Statement

Balancing resilience with progress, Independence aspires to honor its past while fostering a thriving environment for businesses and families alike, improving the quality of life for everyone in our community.

Mission Statement

Committed to resilience and progress, our mission is to celebrate history while actively developing a vibrant future and an enhanced quality of life for all.

Guiding Principles

Our decisions and actions will be guided by a commitment to:

- **Quality of Life:** Ensuring Independence remains a friendly, safe community with excellent services and opportunities for families, citizens, and businesses.
- **Fiscal Responsibility:** Pursuing financial stability for the city and its residents through efficient and effective planning and prioritization of all available resources.
- **Resilience and Progress:** Proactively preparing for challenges while embracing opportunities for growth and continuous improvement.
- **Community and Collaboration:** Fostering a strong sense of community through engagement, involvement, and strategic partnerships.

Summary of Strategic Outcomes & Objectives

This summary outlines the key outcomes the city will focus on. Following this summary, each outcome is explored in greater detail.

Strategic Goal 1: Support high-quality City Services

We will support and enhance the essential services that ensure public safety and community well-being.

- **Objectives:**
  - Support high-quality services in all city departments.
  - Ensure city services can adequately handle future growth.
  - Support employees through adequate resources and opportunities for growth.

Strategic Goal 2: Encourage a supportive environment for businesses, workforce, and economic development

We will encourage a supportive environment for businesses, workforce training, and sustainable economic growth.

- **Objectives:**
  - Promote an environment that supports new and existing businesses.
  - Retain quality paying jobs in the City.
  - Create opportunities for students to learn trades with current employers.
  - Encourage the development of tourism and historical sites.

Strategic Goal 3: Support and enhance City infrastructure

We will support, enhance, and maintain the city's core infrastructure.

- **Objectives:**
  - Invest in water, sewer, streets, and stormwater systems.
  - Address and prevent infrastructure failures, including on key bridges.
  - Ensure efficient and effective planning for Capital Improvement Projects (CIP).

Strategic Goal 4: Efficient and effective planning and prioritizing of all available resources

We will ensure efficient and effective planning to manage community growth and available resources.

- **Objectives:**
  - Continue to pursue and support the financial stability of the city.
  - Support the availability of quality housing for all.
  - Maintain the ability to handle growth with existing services and utilities.
  - Position Independence as a regional hub for Buchanan County.

Strategic Goal 5: Promote and encourage community involvement and engagement

We will promote and encourage active participation and communication throughout the community.

- **Objectives:**
  - Encourage community involvement and engagement.
  - Ensure all voices are heard by catering to both the loudest and quietest voices.
  - Combat the spread of bad information with correct information.

Strategic Goal 6: Support and encourage tourism and historical sites

We will celebrate and promote our unique historical assets to attract visitors, strengthen community pride, and boost our local economy.

- **Objectives:**
  - Support the preservation of key historical sites.
  - Actively promote the city's history and attractions to draw tourism.
  - Integrate tourism as a key component of the city's economic development strategy.
  - Strengthen partnerships with community organizations to create a unified tourism message.

Detailed Strategic Outcomes

This section provides a detailed overview of the six strategic goals that form the foundation of the City of Independence's 2025 Strategic Plan. Each goal is supported by a set of objectives designed to guide city operations, policy decisions, and resource allocation.

Strategic Goal 1: Support high-quality City Services

We will support and enhance the essential services that ensure public safety and community well-being.

The high quality of life in Independence is a direct result of the excellent and reliable services the City provides. Our commitment is to **support high-quality services in all city departments**, from ensuring public safety through our dedicated police and fire departments to enriching the community with our modern public library and well-maintained parks. As our city of over 6,000 residents continues to attract new families, we must **ensure city services can adequately handle future growth**. This involves strategic planning to scale our capabilities, ensuring that response times remain low and public facilities do not become overburdened. Achieving this requires a steadfast commitment to our dedicated city employees; therefore, we will **support employees through adequate resources and opportunities for growth**. By investing in training, competitive compensation, and the necessary equipment, we recognize that our employees are essential to delivering the world-class services our community deserves and expects.

Strategic Goal 2: Encourage a supportive environment for businesses, workforce, and economic development

We will encourage a supportive environment for businesses, workforce training, and sustainable economic growth.

A vibrant and resilient local economy is crucial for the long-term prosperity of Independence. Our focus is to **promote an environment that supports new and existing businesses**, from the entrepreneurs launching new ventures in our historic downtown to our established cornerstone employers in manufacturing and healthcare. A key measure of our success will be our ability to **retain quality paying jobs in the City**, which provides stability for our families and strengthens our community's economic foundation. To build a sustainable workforce for the future, we will work with our local schools and partners like Hawkeye Community College to **create opportunities for students to learn trades with current employers**. By fostering these relationships, we can establish a direct pipeline from education to rewarding careers right here in Independence, ensuring our businesses have the skilled labor they need to flourish.

Strategic Goal 3: Support and enhance City infrastructure

We will support, enhance, and maintain the city's core infrastructure.

Reliable and modern infrastructure is the physical backbone of our community, essential for public health, safety, and economic activity. We are committed to making strategic, proactive **investments in our water, sewer, streets, and stormwater systems,** ensuring they are resilient and efficient. A critical component of this commitment is our focus to **address and prevent infrastructure failures, including on key bridges.** Given the central role of the Wapsipinicon River, protecting vital crossings from potential flood damage is paramount to our community's connectivity and emergency response capabilities. All of these efforts will be guided by a pledge to **ensure efficient and effective planning for Capital Improvement Projects (CIP),** making certain that taxpayer dollars are used wisely to build and maintain an infrastructure that will support our city's residents and industries for decades to come.

Strategic Goal 4: Efficient and effective planning and prioritizing of all available resources

We will ensure efficient and effective planning to manage community growth and available resources.

Prudent, forward-thinking governance is the key to achieving all our strategic goals. This means managing our resources wisely to **continue to pursue and support the financial stability of the city,** ensuring a balanced budget and healthy reserves. Our planning will address fundamental community needs, and we will actively **support the availability of quality housing for all** residents, from single-family homes to rental options, to attract and retain a diverse population. As we grow, it is critical that we **maintain the ability to handle growth with existing services and utilities,** ensuring development is sustainable and does not outpace our capacity. Through this deliberate and effective planning, we will solidify our standing and **position Independence as a regional hub for Buchanan County**, leveraging our status as the county seat to become a center for commerce, services, and community life.

Strategic Goal 5: Promote and encourage community involvement and engagement

We will promote and encourage active participation and communication throughout the community.

An engaged community is a strong community, building on our town's well-known friendly and neighborly spirit. Our goal is to foster a culture of open, transparent, and two-way communication that builds trust between the city government and its residents. We are committed to creating accessible channels to **encourage community involvement and engagement**, from serving on boards to participating in public forums, so citizens can share their ideas and stay informed. A core principle of this

effort is to **ensure all voices are heard by catering to both the loudest and the quietest voices**, making our decision-making process more inclusive and representative of our entire community. To empower our citizens and maintain public trust, we will actively **combat the spread of bad information with correct information** through official city channels, ensuring our communications are timely, factual, and clear.

Strategic Goal 6: Support and encourage tourism and historical sites

We will celebrate and promote our unique historical assets to attract visitors, strengthen community pride, and boost our local economy.

Our city's history is one of its greatest assets and a core component of our community's identity. Our strategy begins with a commitment to **support the preservation of key historical sites**, protecting the landmarks that tell our story, from the Wapsipinicon Mill to the legacy of the Gedney Hotel and our "Lexington of the North" heritage. With that foundation, we will **actively promote the city's history and attractions to draw tourism**, sharing the unique character of Independence with a wider audience through attractions like the Heartland Acres Agribition Center. This is not just a cultural goal; we will **integrate tourism as a key component of the city's economic development strategy**, recognizing that visitors support our local shops, restaurants, and breweries. To succeed, we will **strengthen partnerships with community organizations** like the Chamber of Commerce and local historical societies to create a unified tourism message, ensuring a collaborative and effective approach to showcasing our city.

Conclusion: A Commitment to a Vibrant Future

The 2025 Strategic Plan represents more than a document; it is a declaration of our shared priorities and a roadmap for the future of Independence. It articulates a clear vision for a resilient and progressive community that honors its history while building a prosperous future for all. By bridging our legacy as the "Lexington of the North" with the modern needs of a growing economy, we affirm our commitment to honoring our past while fostering a thriving environment for businesses and families alike.

Our roadmap focuses heavily on the physical and economic foundations of our city. We are committed to making strategic investments in our core infrastructure, including water, sewer, and streets, while specifically addressing the resilience of key bridges over the Wapsipinicon River. This physical backbone supports our economic vitality. It enables us to retain quality paying jobs and create pipelines for students to learn trades with current employers, ensuring our workforce remains as robust as our history.

We recognize that prudent governance is the key to achieving these outcomes. We will pursue financial stability through efficient planning for Capital Improvement Projects, ensuring taxpayer dollars are used wisely to support community growth. As we position Independence as a regional hub for Buchanan County, we must ensure our services scale effectively to handle new development without overburdening our resources or our staff. We pledge to support our employees with the training and resources they need to deliver the high-quality services our residents expect.

This plan is not an end, but a beginning. Its success depends on a culture of open, transparent communication. We are dedicated to ensuring all voices are heard by catering to both the loudest and the quietest voices in our community. We will actively work to combat the spread of bad information with correct information to maintain public trust.

The City is committed to a process of continuous improvement, with plans for regular strategic reviews every two years and council retreats to prioritize goals. Achieving these ambitious goals requires a united effort. It depends on the dedication of our city officials and staff, the innovation of our local businesses, and the active engagement of our citizens. By adhering to the principles and pursuing the goals outlined in this plan, we will continue to enhance the quality of life for everyone who calls our community home.

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Ordinance to amend Chapter 175 – Subdivision Regulations, to align design standards with the Statewide Urban Design And Specifications (SUDAS)

DISCUSSION:

We recently adopted the Statewide Urban Design and Specifications (SUDAS) program to standardize our engineering design and construction practices. Following this adoption, we conducted a comprehensive review of Chapter 175 (Subdivision Regulations) to identify areas where our existing Code differed from these new state-wide standards.

Our review identified several sections within Chapter 175 that rely on outdated "City standards" or contain specific dimensional requirements that conflict with SUDAS. To ensure clarity for developers and engineers working in Independence, we must update these regulations to reference SUDAS directly. The proposed Ordinance addresses the following key areas:

- **Street Design:** We are updating pavement widths, street grades, and geometric design criteria to align with SUDAS Design Manual Chapter 5. This includes adjusting our cul-de-sac standards to meet fire code and SUDAS recommendations.
- **Stormwater Management:** The update mandates the use of SUDAS design methodologies for hydrology and intake spacing, ensuring our drainage systems meet modern performance standards rather than arbitrary distance limits.
- **Utilities:** We are aligning our water and sanitary sewer standards with SUDAS, including critical separation requirements mandated by the Iowa DNR and updated fire hydrant spacing to improve coverage.
- **Sidewalks:** The Ordinance updates sidewalk construction standards to match SUDAS specifications, which support better accessibility and long-term durability.

By adopting these amendments, we ensure that our Subdivision Regulations are consistent with the technical manuals recently adopted. This reduces confusion during the plan review process and ensures that future public improvements are built to the high standards established by the SUDAS program.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

ORDINANCE NO. 2026-

AN ORDINANCE AMENDING THE CODE OF ORDINANCES OF THE CITY OF INDEPENDENCE, IOWA, BY AMENDING PROVISIONS TO CHAPTER 175 SUBDIVISION REGULATIONS.

BE IT ENACTED by the City Council of the City of Independence, Iowa:

Section 1. PURPOSE. The purpose of this ordinance is to update the City's subdivision regulations to adopt and reference the Iowa Statewide Urban Design and Specifications (SUDAS) program for the design and construction of public improvements.

Section 2. AMENDMENT. Section 175.03 (DEFINITIONS) of the Code of Ordinances is hereby amended by adding the following new definition:

29. "SUDAS" means the current edition of the Iowa Statewide Urban Design and Specifications Manuals (Design Manual and Standard Specifications) as adopted by the City Council.

Section 3. AMENDMENT. Section 175.30 (CONFORMANCE STANDARDS), Subsection 5, is hereby amended by repealing the subsection in its entirety and adopting the following in lieu thereof:

5. SUDAS Standards. All public improvements shall be designed and constructed in accordance with the current edition of the SUDAS Design Manual and SUDAS Standard Specifications, as adopted by the City Council. Where the standards of this Chapter are in conflict with SUDAS, the more restrictive standard shall apply unless otherwise approved by the Council.

Section 4. AMENDMENT. Section 175.37 (STREETS – DESIGN STANDARDS) is hereby amended by repealing Subsections 1(C), 1(D), 1(E), and 1(F) and adopting the following in lieu thereof:

C. Roadway and Right-of-Way Standards. The minimum right-of-way and pavement widths for all street classifications shall be designed in accordance with the SUDAS Design Manual.

D. Street Grades. Maximum and minimum street grades shall conform to the preferred values set forth in the SUDAS Design Manual.

E. Vertical Curves. All changes in street grade shall be connected by vertical curves designed in accordance with the SUDAS Design Manual.

F. [Reserved].

Section 5. AMENDMENT. Section 175.37 (STREETS – DESIGN STANDARDS), Subsection 1(C)(5) regarding Cul-de-sacs is hereby amended to read as follows:

(5) Cul-de-sacs. Cul-de-sacs shall meet all requirements of the SUDAS Design Manual. The maximum length of a cul-de-sac shall be as stated in the SUDAS Design Manual, or as required by the International Fire Code. The turnaround shall have a minimum roadway radius of 45 feet (or as required by the International Fire Code) and a right-of-way radius of 50 feet.

Section 6. AMENDMENT. Section 175.38 (STORM SEWERS AND DRAINAGE), Subsection 1, is hereby amended by repealing the subsection in its entirety and adopting the following in lieu thereof:

1. General Requirements. The Commission shall not recommend for approval any plat of a subdivision which does not make adequate provision for storm or flood water run-off channels or basins. The storm water drainage system shall be separate and independent of any sanitary sewer system.

A. Design Standards. Storm sewers and drainage facilities shall be designed in accordance with the SUDAS Design Manual. Design computations shall be submitted along with plans.

B. Inlet Spacing. Intake design and spacing shall comply with the SUDAS Design Manual to ensure surface water spread does not exceed safe limits.

C. Materials. Storm sewer pipe materials shall comply with the SUDAS Standard Specifications.

Section 7. AMENDMENT. Section 175.39 (WATER FACILITIES) is hereby amended by adding the following requirement to Subsection 1:

D. Standards. All water mains and appurtenances shall be designed in accordance with the SUDAS Design Manual and constructed in accordance with the SUDAS Standard Specifications.

Section 8. AMENDMENT. Section 175.39 (WATER FACILITIES), Subsection 3 (Fire Hydrants), is hereby amended to read as follows:

3. Fire Hydrants. Fire hydrants shall be required for all subdivisions except those coming under Subsection 2 of this section. Fire hydrants shall be located in accordance with the SUDAS Design Manual, typically spaced no more than 400 to 450 feet apart and within 300 feet of any structure, subject to approval by the Fire Chief.

Section 9. AMENDMENT. Section 175.40 (SEWAGE FACILITIES) is hereby amended by adding the following new Subsection 5:

5. Standards. All sanitary sewer facilities shall be designed in accordance with the SUDAS Design Manual and constructed in accordance with the SUDAS Standard Specifications. Service stubs shall be installed in accordance with the SUDAS Standard Specifications. Separation of sanitary sewers and water mains shall comply with the SUDAS Design Manual.

Section 10. AMENDMENT. Section 175.41 (SIDEWALKS), Subsection 2 (Construction), is hereby amended to read as follows:

2. Construction. Sidewalks shall be improved as required in Subsection 2 of Section 175.37 of this chapter. Sidewalks shall be constructed of Portland cement concrete with a minimum width of five (5) feet and a minimum thickness of four (4) inches (six (6) inches at driveways), in accordance with the SUDAS Standard Specifications and the SUDAS Design Manual.

Section 11. AMENDMENT. Section 175.42 (UTILITIES), Subsection 1, is hereby amended by adding the following sentence:

Utility location and separation shall comply with the guidelines set forth in the SUDAS Design Manual.

Section 12. REPEALER. All ordinances or parts of ordinances in conflict with the provisions of this ordinance are hereby repealed.

Section 13. SEVERABILITY CLAUSE. If any section, provision, or part of this ordinance shall be adjudged invalid or unconstitutional, such adjudication shall not affect the validity of the ordinance as a whole or any section, provision or part thereof not adjudged invalid or unconstitutional.

Section 14. WHEN EFFECTIVE. This ordinance shall be in effect following its final passage, approval and publication as provided by law.

PASSED AND APPROVED by the City Council of Independence, Iowa, on this ___ day of _____ 2026.

_____
Brad Bleichner, Mayor of the City of Independence, IA

ATTEST:

_____
Susi Lampe, CMC, IaCMC, IaCFO,
Assistant City Manager/City Clerk/Treasurer of the City of Independence, IA

First Reading: _____
Second Reading: _____
Third Reading: _____

I certify that the foregoing was published as Ordinance No. 2026- on the _____ day of _____ 2025.

_____
Susi Lampe, CMC, IaCMC, IaCFO,
Assistant City Manager/City Clerk/Treasurer of the City of Independence, IA

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Voluntary Annexation Application Update

DISCUSSION:

The City has received an Application for Voluntary Annexation from BCM Development, LLC and BCM Real Estate, LLC regarding property adjacent to the current corporate limits.

The application includes two private parcels: Parcel #1 (1009100003) and Parcel #2 (1009100001). To ensure contiguity and avoid creating an "island" of unincorporated territory, the annexation application also includes a City-owned parcel (Parcel #3: 1009100002) located between the two applicant parcels.

This item is to provide the Council with an update on the current status of this proposed annexation.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

CITY COUNCIL
WORK SESSION
MEMORANDUM

TO:	City Council
FROM:	Matthew R. Schmitz, MPA - City Manager
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	ILPT Annual Billing Agreement

DISCUSSION:

We have received the updated annual billing agreement from Independence Light & Power. The cost is split between the Water and Sewer departments. The attached agreement shows the proposed changes. At this time, Staff does not have any concerns about this revised agreement.

RECOMMENDATION:

Staff recommends discussion of this topic. No action is needed at this meeting, as any decision items needed would be brought forward to a City Council meeting for approval.

AGREEMENT FOR BILLING SERVICES AND WATER METER READING

THIS AGRREMENT made and entered into this ? day of January 2026 by and between the City of Independence, Iowa, a Municipal Corporation, Party of the First Part, hereinafter called the "City", and Independence Light & Power, Telecommunications, a Municipal Utility, Party of the Second Part, hereinafter called "ILP,T".

WITNESSETH:

WHEREAS the City and ILP, T have combined City municipal and ILP, T billing for utilities; and

WHEREAS the City municipal utilities billing is for water, sewer, garbage, storm water utility, and environmental fees; and

WHEREAS the ILP,T utilities billing is for electric and telecommunications, including internet, cable television, and telephone; and

WHEREAS ILP,T handles for the City all billing, payments, taking all calls, responding to complaints, scheduling appointments, processing water meter readings, creating meter maintenance orders, maintaining customer records, maintaining the billing system, collections, disconnect orders and reconnect orders, generation of reports, collect all revenues, disbursements to the appropriate City funds, and performs all banking functions relating to water, sewer, garbage, storm water utility, and environmental; and

WHEREAS the combination of utility billings into a centralized location and operation provides economic benefits to both entities, as well as, to the citizens of Independence, Iowa; and

WHEREAS the City has recently begun to roll out AMI water meters and has made plans to complete the conversion of all its water meters to the AMI technology; and

WHEREAS ILP,T has completed the installation of AMI electric meters and has completed a conversion of its billing system over to NorthStar; and

WHEREAS ILP,T will begin to utilize, through its membership in WPPI Energy, the Meter Data Management platform for; collecting, storing, and validating interval meter data, as well as providing future technology improvements such as Outage Notification, Outage management, Demand response, Electric Rate Design, and Customer access to interval electric and water data via online portal (MyMeter); and

NOW THEREFORE, IN CONSIDERATION OF THE MUTUAL COVENANTS AND AGREEMENTS contained herein to be kept and performed by each of the parties hereto, it is mutually agreed as follows:

1. That all billing for City municipal utilities and services, and ILP,T utilities and services shall be centralized and located at the ILP,T office at 700 7th Street NE, Independence, Iowa.

2. All complaints regarding City municipal utilities shall first be attempted to be resolved by ILP, T. If the complaint cannot be resolved, said complaint will then be forwarded to the City Manager.

3. ILP, T shall be responsible for receipt of all payments and/or City municipal utility deposits and any such payments or City municipal utility deposits received shall be deposited daily to the appropriate City accounts as currently exist.

4. The City Water Department shall receive its share of all penalties which are assessed and received by ILP, T for late payment charges.

5. ILP,T agrees to abide by all regulations of the State and Federal Commerce Commission or any regulatory agencies supervising or promulgating rules concerning City municipal utilities, ILP, T and/or utility billings in general.

6. ILP,T shall assume and be responsible for all expenses involved in the billing process, including but not limited to, postage, forms, etc. The City's payment to ILP, T shall be reviewed on an annual basis, not later than January 31 of each year, with any revision in the annual payment to be effective July of the year in question. The City and ILP, T further agree to meet each year concerning other provisions of this agreement.

7. The City shall pay to ILP, T beginning July 1, 2026, the sum of $75,109.67 annually for such services provided by ILP, T as are necessary for the City municipal utility billings.

8. In addition to the 75,109.67 for billing service. ILP,T will track and record, on the City Electric and Labor Report, all work (in-kind) completed by ILP,T staff for the purpose of collecting meter reads on water meters that are not yet converted to AMI and or are having communication issues with the AMI Network.

The conditions and covenants of this Agreement shall inure to the benefit and be binding upon the successors, assigns, or transferee of either party hereto.

This Agreement is subject to the approval of the City Council of the City of Independence, Iowa, and of the Independence Light & Power, Telecommunications Board of Trustees.

This Agreement shall take effect upon the date first written above and shall remain in effect for an initial term that ends at midnight June 30, 2027, and thereafter until terminated by notice as provided in this section. This contract may be terminated by either party upon one (1) year prior written notice, sent by registered mail, to the other party effective at the end of the initial term, or any time thereafter.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed by their duly authorized officers, as of the date and year first above written.

Independence Light & Power, Telecommunications	City of Independence
By: Lance Fricke	By: Matthew R. Schmitz
_____ ___	_____
Chair of Utility of Board of Trustees	City Manager

CITY COUNCIL MEMORANDUM

TO:	City Council
FROM:	Susi Lampe, CMC, IaCMC, IaCFO – Assistant City Manager/City Clerk/Treasurer
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Closed Session pursuant to Iowa Code 21.5(1)(j): Real Estate Strategy

BACKGROUND: Administration has identified a potential real estate transaction that requires Council consideration. To protect the City's financial interest and negotiating position, the specifics must be discussed confidentially prior to any public action.

21.5 CLOSED SESSION

1. A governmental body may hold a closed session only by affirmative public vote of either two-thirds of the members of the body or all of the members present at the meeting.

A governmental body may hold a closed session to the extent a closed session is necessary for any of the following reasons:

(j) To discuss the purchase or sale of particular real estate only where premature disclosure could be reasonably expected to increase the price the governmental body would have to pay for that property or reduce the price the governmental body would receive for that property.

The minutes and the audio recording of a session closed under this paragraph shall be available for public examination when the transaction discussed is completed.

DISCUSSION:

We utilize this closed session to discuss negotiation strategy and protect the City's financial interests. Consistent with Iowa Code, no final action or vote will occur during this private discussion. Any official decision to proceed with a transaction will take place in an open public session.

RESULTS:

The City has established priorities during strategic planning sessions. This item supports the Vision from that session of **efficient and effective planning and prioritizing of all available resources**. This item helps achieve that vision by ensuring the City exercises fiscal responsibility and strategic foresight when managing its real estate assets.

FINANCIAL CONSIDERATION:

There is no direct cost to hold the closed session. Any financial impact regarding the purchase or sale of property will be addressed in the open session following the discussion.

RECOMMENDATION:

Staff recommends a motion to enter into a closed session per Iowa Code 21.5(1)(j) to discuss the purchase/sale of particular real estate.

CITY COUNCIL MEMORANDUM

TO:	City Council
FROM:	Susi Lampe, CMC, IaCMC, IaCFO – Assistant City Manager/City Clerk/Treasurer
DATE OF MEETING:	January 5, 2026
ITEM TITLE:	Action regarding Real Estate Strategy following Closed Session

BACKGROUND:

The City Council adjourned into a Closed Session pursuant to Iowa Code 21.5(1)(j) to discuss the purchase or sale of particular real estate. This session was held to prevent premature disclosure that could reasonably be expected to increase the price the City would have to pay or reduce the price the City would receive for the property. The Council has now returned to open session to consider a potential motion regarding this real estate matter.

DISCUSSION:

While the specific details regarding price and negotiation strategy were discussed in the closed session to protect the City's financial position, any final action to purchase or sell property must be taken in an open public meeting. This item allows the Council to formalize the direction discussed during the closed session. This ensures transparency in the final decision while having maintained the necessary confidentiality during the negotiation phase.

RESULTS:

The City has established priorities during strategic planning sessions. This item supports the Vision from that session of **efficient and effective planning and prioritizing of all available resources**. This item helps achieve that vision by ensuring the City exercises fiscal responsibility and strategic foresight when managing its real estate assets.

FINANCIAL CONSIDERATION:

The specific financial impact depends on the motion made by the Council following the closed session. If a purchase or sale is authorized, the specific funding source or revenue line item will be identified in accordance with the City's budget and financial policies.

RECOMMENDATION:

Staff recommends a motion to authorize the City Manager to move forward with the course of action Council discussed in the Closed Session.