



**CIVIL SERVICE COMMISSION
MEETING AGENDA**
Thursday, March 07, 2024 at 4:00 PM
Commission Chambers, 300 Municipal Drive,
Madeira Beach, FL 33708

Meetings will be televised on Spectrum Channel 640 and YouTube Streamed on the City's Website.

- 1. CALL TO ORDER**
- 2. ROLL CALL**
- 3. PUBLIC COMMENT**

Public participation is encouraged. If you are addressing the Civil Service Commission, step to the podium and state your name and address for the record. Please limit your comments to three (3) minutes and do not include any topic on the agenda. Public comment on agenda items will be allowed when they come up.

- 4. APPROVAL OF MINUTES**

A. 2024-01-03 Civil Service Commission Meeting Minutes

- 5. HR REPORT**

- 6. RFP 24-01 HR, CLASSIFICATION, AND COMPENSATION PLANS STUDY**

A. Proposal - AutoSolve, Inc.

B. Proposal - Bolton Partners, Inc.; DBA Bolton

C. Proposal - Cody & Associates, Inc.

D. Proposal - Evergreen Solutions

E. Proposal - Gallagher Benefit Services, Inc.

F. Proposal - Gehring Group, Inc.

G. Proposal - Paypoint HR

H. Proposal - Pontifex Consulting Group

I. RFP, Bid Tabulation, and Sign-in Sheet, References Contacts - RFP 2024-01, HR Classification and Compensation Plans Study

7. "DRAFT" EMPLOYEE PERSONNEL POLICY - UPDATED THROUGH JANUARY 2024

- A. "Draft" Employee Personnel Policy - updated through January 2024 [*At the next meeting, the Civil Service Commission will begin their discussion on page VII, 15. H. 2. Short-Term Disability Leave / Reasonable Accommodations / Fitness for Duty Exam*]
- B. Revisit question regarding permanent additional duties, page V. C. b.

8. ITEMS TO BE SCHEDULED FOR FUTURE DISCUSSIONS

- A. Ordinance 2023-06, Amendment to Civil Service Commission Rules (*to address after adoption of personnel policy*)
- B. RFP – Classification and Compensation Plan Study - (*in process*)
- C. Classification of all Classified City Positions, based upon the Duties, Authority, and responsibility of each position, with adequate provisions for classification of any position whenever warranted by circumstances (City Charter, Sec. 5.7, C, 1) - (*in process*)
- D. Pay Plan for all Classified City Positions (City Charter, Section 5.7, C, 2) - (*in process*)
- E. Methods for determining Merits and Fitness of Candidates for Appointment or Promotions (City Charter, Section 5.7, C, 3) - (*to verify redlines in Personnel Policy on March 7th, then decide to remove the item*)
- F. Implementation Process for making sure that all Rules, Regulations and Procedures of the Employee Personnel Policy are working and is followed by everyone (City Charter, 5.7, C, 8) - (*item to be addressed in Ordinance 2023-06, Civil Service Commission Rules*)
- G. Ex Officio Board Member – Robert’s Rules of Order – (*City Clerk to schedule training – All Board members are invited*)
- H. Decide the date Sick Leave Accrual will end for the payout- (*Revisit before going live with the Personnel Policy*)
- I. Department Specific Rules – (*for review at a future meeting*)
- J. Employee Satisfaction Survey – (*to address after Personnel Policy is adopted*)
- K. Employee Termination Survey – (*to address after Personnel Policy is adopted*)
- L. Review of Offer Letter – (*to address after Personnel Policy is adopted*)

M. Exit Interview Survey – *(to address after Personnel Policy is adopted)*

N. HR Director Position – *(to address after Personnel Policy is adopted)*

O. PowerPoint History Presentation- Civil Service Commission beginning when it was first created by the City of Madeira Beach Voters – *(to address after Personnel Policy is adopted)*

9. NEXT MEETING - Wednesday, June 5, 2024 @ 4:00 p.m.

10. ADJOURNMENT

One or more Elected or Appointed Officials may be in attendance.

Any person who decides to appeal any decision of the Civil Service Commission with respect to any matter considered at this meeting will need a record of the proceedings and for such purposes may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The law does not require the minutes to be transcribed verbatim; therefore, the applicant must make the necessary arrangements with a private reporter or private reporting firm and bear the resulting expense. In accordance with the Americans with Disability Act and F.S. 286.26; any person with a disability requiring reasonable accommodation to participate in this meeting should call City Clerk Clara VanBlargan at 727-391-9951, Ext. 231 or 232 for email a written request to cvanblargan@madeirabeachfl.gov.



MINUTES
CIVIL SERVICE COMMISSION
MEETING
JANUARY 3, 2024
4:00 P.M.

The City of Madeira Beach Civil Service Commission meeting was scheduled for 4:00 p.m. on January 3, 2024, in the Patricia Shontz Commission Chambers at City Hall, located at 300 Municipal Drive, Madeira Beach, Florida.

MEMBERS PRESENT: Jerry Cantrell, Chair
Cristina Ponte, Vice Chair
Paul Tilka
Judithanne McLauchlan
Clara VanBlargan, Ex-Officio Secretary

MEMBERS ABSENT:

CITY STAFF PRESENT: Robin Gomez, City Manager
Megan Powers, Assistant to City Manager/HR Staff
Attorney Rob Eschenfelder, Trask Daigneault, L.L.P.

1. CALL TO ORDER

Chair Jerry Cantrell called the meeting to order at 4:07 p.m.

2. ROLL CALL

City Clerk Clara VanBlargan called the roll. All were present.

3. PUBLIC COMMENT

There were no public comments.

4. APPROVAL OF MINUTES

A. Approval of Minutes

- **2023-11-20, Civil Service Commission Meeting Minutes**

Commissioner McLauchlan asked to show in the minutes she was present at the meeting.

Vice Chair Ponte motioned to approve the minutes with the correction. Commissioner McLauchlan seconded the motion, and all were in favor. The motion carried 4-0.

Chair Cantrell asked that they discuss Item 7. A, the RFP – Classification and Compensation Plan Study, after the HR Report. The Commission agreed.

5. HR REPORT

HR Staff Megan Powers gave an update to the HR Report.

6. NEW BUSINESS

A. RFP – Classification and Compensation Plan Study

Chair Cantrell said the scope of service is what they are asking for and asked if it covered all City positions. The City Manager said yes.

The City Manager said the responses to the RFP and a recommendation would be brought back to the March 7, 2024 meeting. It would then go to the Board of Commissioners for approval.

After a brief discussion among the board members, Vice Chair Ponte motioned to accept the RFP presented in the packet and begin advertising. Commissioner Tilka seconded the motion, and all were in favor. The motion carried 4-0.

7. OLD BUSINESS

I. "Draft" Personnel Policy Manual (starting on Page VII-4. B. Sick Leave)

Chair Cantrell suggested he read aloud the first sentence of every paragraph so it would be easier to track where they are going to make a change. The Commission consented.

Chair Cantrell said at the next meeting he would like to revisit a question from the last meeting regarding permanent additional duties on page V.C.b. that he would like the attorney to clarify. He would like the City Clerk to put a placeholder on that agenda.

VII. LEAVES OF ABSENCE

B. Sick Leave

NOTE: Family and Medical Leave Act (FMLA) will be considered and, if applicable, will run concurrently with Sick Leave. (See FMLA Section: VII.L.)

1. Full-time and part-time employees who fill established positions earn Sick Leave credits each bi-weekly pay period based on a maximum of 80 paid hours (pro-rated if less than January 3, 2024, Civil Service Commission Meeting Minutes

80). Tracking of sick leave accruals is by the calendar year. The accrual rate for regular employees is five hundredths (.05) of an hour for each hour paid up to a maximum of 80 hours (.07 for Fire/EMS employees on 24/48 hour shifts). (Examples: 80 paid hrs. x .05 = 4 hrs.; 60 paid hrs. x .05 = 3 hrs.; EMS 80 paid hrs. x .07 = 5.6 hrs., etc.).

Chair Cantrell asked if they talked about what maternity leave would look like. The attorney said he will write it and bring it back to them for discussion.

Attorney Eschenfelder said that in the current policy sick leave is granted to all full-time employees at a rate of 96 hours per year, 8 hours per month. Part-time and temporary employees are not eligible to receive that benefit. Sick leave is accrued with no maximum. Employees can cash out up to 24 hours of their earned sick leave for perfect attendance without sick leave used during that fiscal year. The final payout upon separation is 25% of the accrued hours. At the last meeting it was said they wanted no payout of sick leave and no maximum accrual. The City Clerk said they had mentioned allowing one last payout before January 2025. Chair Cantrell said that was so everybody would be where they needed to be and not lose time.

Attorney Eschenfelder said they should write it to say no payout, and then at the end, they debate where they draw the line so current employees do not feel they have been slighted. After they are done with the policy, they release it to the Board of Commissioners with a recommendation of what to do with current employees. They could determine when the last payout would be at that time.

Chair Cantrell asked the City Clerk to put down that before they go live with the Personnel Policy, they should address the date the sick leave accrual will end for payout.

Chair Cantrell asked if the numbers plugged in paragraph 1 were approximations or actual hours. The attorney said those are numbers he plugged in there in 2020. He read the current policy and said they needed to debate if they wanted to change the current policy or otherwise he will stick in the current policy. The City Manager said he was good with the current policy numbers. The attorney said he does not recommend carrying forward the sick leave payout because it encourages people not to take their sick leave so they can get a payout of their sick leave. That will not transfer over to the current policy unless they want it to transfer over.

2. Employees using sick leave are paid at the hourly rate in effect at the time the approved sick leave is taken, but such leave used shall not count as hours worked for any purpose other than FMLA eligibility.
3. During leave of absence with pay, employees continue to earn sick leave credits (with the exception of employees drawing hours from the Sick Leave Bank or Long-Term Disability).
4. Full-time and part-time employees who fill established positions may accumulate unlimited sick leave credits.
5. Sick leave earned during any pay period is credited to the employee on the last day of January 3, 2024, Civil Service Commission Meeting Minutes

that pay period. In the case of employment termination, it is credited on the last day the employee is on the payroll.

6. Use of sick leave credits cannot be authorized prior to being earned and credited. Aand used only with approval from the department director or designee, who may require sufficient and specific medical documentation of the need for leave prior to authorizing sick leave pay. Sick leave pay may be denied to any employee who fails to provide requested documentation.

Vice Chair Ponte recommended that after the word credited in the first sentence, put a period to make its own sentence for clarity. The Commission agreed.

7. Sick leave hours are charged to an employee's sick leave account. If accumulated sick leave is exhausted, the employee may request through the appropriate departmental authority to use vacation, compensatory time, or personal holiday (may be used only as a whole day) leave to cover remainder of the absence.

Commissioner McLauchlan asked if there was a sick leave pool. Chair Cantrell said not in the current policy and paragraph 3 is the only reference to sick leave bank in the entire document. Attorney Eschenfelder said he would add a "Sick Leave Bank" subsection and create a sick leave bank.

Chair Cantrell asked if the City offered short-term or long-term disability for the employees. The City Manager said yes. Chair Cantrell said there should be a maximum amount that can be donated to a person. If the person is on FMLA, the total donation should not exceed the time FMLA allows.

Commissioner McLauchlan said they need the section on the sick leave bank because it does not make sense for individual people to donate to individual people. It seems complicated. She suggested having one bank. If somebody needs it, they can draw on it.

Attorney Eschenfelder said they had the donation system in the City of Saint Petersburg long ago when he was an attorney there. He had donated 30 hours of his time to an employee, which was very generous because his pay rate was way more than 30 hours for her. He does not recommend that system because it sets up a popularity contest. He recommended his sick leave bank policy. People can donate to a sick leave bank. If they do, they are participants in the program run by employees who are a committee of three or so people. Management stays out of making decisions that are by their nature arbitrary. The committee would make the decisions based on merits, and donations would be made dollar for dollar. Ms. Powers explained how they do it currently.

The City Manager said having a sick leave pool is the simplest way. When an employee request hours, hours are donated to them. The attorney read his sick leave bank policy. Commissioner McLauchlan suggested adding the attorney's sick leave bank policy to the listing in paragraph 7.

Commissioner Tilka asked if he was an employee making \$30 an hour and if he donated an hour to another employee making \$15 an hour, would that employee get a \$30 credit? The attorney said it would be dollar for dollar. An employee would be donating the value of his sick leave hour. If a higher-paid employee makes \$20 an hour, they would be giving \$20 to the sick leave bank for one hour. If a \$10 an hour employee uses it, they get two hours of sick leave donation. People with

different rates of pay would be donating to the pool.

The City Manager said that needed to be reviewed because he was not sure if they are currently doing it that way. If donating an hour, it is just an hour regardless of who donated the hour and regardless of their rate of pay. The attorney said the City is already accounting for sick hours at the rate of the employee's pay. It is on the computer somewhere. If he gives "x" number of hours, it translates to "x" number of dollars based on his hourly pay rate.

The City Clerk said she had seen that type of report long ago. It showed the total hours donated and the value of each hour donated.

The City Manager said the program should be based on hours, not dollars. If an employee asks for 20 hours, they receive 20 donated hours.

Vice Chair Ponte suggested tabling the item until they receive additional information from the attorney. They need to figure out what works and makes sense. If they cannot implement it, there is no need to do it. The Commission agreed.

Chair Cantrell asked that the information be brought back to them. Ms. Powers said she would contact HR in other cities to see what they are doing and if they have software used for that. Vice Chair Ponte said a timesheet software should do it.

8. Sick leave can be authorized for the following purposes:

a. Personal Sick Leave

Personal Sick Leave is for an employee's personal illness, injury, or exposure to a contagious disease which could endanger other employees. Any sick leave credits used for these reasons are authorized in accordance with the provisions of Section VII.B.9. For purposes of this Policy, personal illness includes complications in pregnancy, miscarriage, childbirth, and recovery from these. Note: Medical Attention - In accordance with 29 C.F.R., § 785.43, and Section IV.B.6, time spent by an employee in waiting for and receiving non-elective medical attention (with the exception of worker compensation- related visits) on the premises or at the direction of the employer during the employee's normal working hours on days when he or she is working constitutes hours worked.

9. The employee has the responsibility of notifying his/her supervisor or other designated personnel when sick leave absence is necessary. This notification should be given prior to the absence, if possible, or as soon as possible on the first day of absence. Upon request, an employee may be permitted to use sick leave credits if the following procedures are followed:

a. Prior to authorizing an employee to use sick leave credits, the department director may require the employee to certify that the absence is for reasons outlined in this Policy.

b. After three (3) consecutive workdays (regardless of number of scheduled hours in any workday) of sick leave absence, the employee ~~may shall~~ be required to provide FMLA medical certification from a certified health care provider before being

authorized to use additional sick leave credits, ~~unless deemed unnecessary by the department director based upon facts already known.~~

Vice Chair Ponte requested to change subsection b to say an FMLA medical certification "may" be required instead of "shall" be required. If using the word "may," the language at the end of the sentence that reads, "unless deemed unnecessary by the department director based upon facts already known" should be removed. Chair Cantrell said it would not be needed.

- c. Employees may be required to report periodically (no more often than seven (7) calendar day intervals) on the status of their sick leave and intent to return to work and may be required to submit (no more often than thirty (30) day intervals) medical certification/re-certification from a certified health care provider if their sick leave continues.
- d. Employees may be required to convalesce at a specific location, such as ~~a health care facility or~~ at home where deemed necessary by the department director to prevent abuse of sick leave.

Chair Cantrell said it should be done by a healthcare provider, not a department director. The attorney recommended leaving it as worded, or it could be worthless. An employee can get a healthcare provider to write whatever they want. That should be a tool in the manager's toolchest. It will only be in a situation when management suspects they are not really sick. Chair Cantrell suggested removing the language "a healthcare facility or" from paragraph 9. d. The Commission agreed.

- e. Upon returning to work following a long-term illness or injury, an employee may be required to provide medical certification from a certified health care provider showing he/she is safely able to perform the essential functions of his/her job with or without reasonable accommodation.

Vice Chair Ponte suggested combining Sections VII.B.6. and VII.B.9 because it seems redundant. Attorney Eschenfelder said he would look at it to see if it was appropriate.

- 10. An employee who refuses to comply with the above stated requirements is not eligible to use sick leave credits. Any unapproved absence from work will be considered unauthorized and may subject the employee to disciplinary action in accordance with the provisions of Section XI. of this Policy.
- 11. Employees providing written documentation from a certified health care provider indicating that the employee is unable to perform regular job duties due to an accident, illness, or medically related reason, with the approval of the department director, may be placed on light duty status or assigned to perform other temporary duties which will not be prohibited by the condition during recuperation, within the following guidelines:
 - a. The employee's hourly rate of pay remains the same, including personnel working non- standard schedules (such as 24/48 shifts).

- b. If requested by the employer, the employee submits to a physical examination by a certified health care provider (selected and paid for by the department) prior to approval (or continuation) of the temporary status. Failure to comply could result in denial of use of further sick leave.
- c. The temporary status may be approved by the department director for a period not to exceed three (3) consecutive months.
- d. Requests to remain in temporary status in excess of the three-month period must be authorized by the City Manager. Such requests will only be considered under exceptional circumstances.
- e. Approval of temporary light duty is in the sole discretion of the City and is conditioned upon the availability of budgeted payroll funds to pay the employee and/or temporary workers at the same time, the disruption which may be caused to other workers in the workplace, the needs of the department, and the availability of bona fide light duty work to be done.
- f. With documentation from a certified health care provider stating the employee may return to regular, unrestricted, full duty status, the employee will resume his/her regular position.

Vice Chair Ponte asked if a position must be kept available. Attorney Eschenfelder said if it is an FMLA qualifying event, they would be required to hold the position for at least twelve weeks. If the employee's healthcare provider said they are able to come back and the employee claimed to be still sick and did not come back after the 12 weeks, they would not be able to return to the position.

- g. When approved to return to regular, unrestricted, full duty status, failure by the employee to do so could result in termination of employment under Section XI. of the Policy.
- h. Approval of temporary light duty does not signify the City's agreement that the employee is a qualified individual with a disability under the Americans with Disabilities Act ("ADA") or the Rehabilitation Act, or that the employee is covered by the terms of the FMLA or abrogate any defense that the City may have under the civil rights laws.
- i. Employees who are determined to be unable to perform the essential functions of their job may either request a reasonable accommodation under Section IX.E, or where no accommodation is available, be referred to the Alternate Employment Program under Section IX.F.

12. ~~Payment of Unused Sick Leave~~

- ~~a. Sick leave will NOT count as time worked for the calculation of overtime. Cash-Out Sick leave may be accrued with no maximum. Employees shall be allowed to cash-out up to 24 hours of their earned sick for having perfect attendance without sick leave used during that fiscal year. The final payout upon separation will be made on 25% of the accrued hours, subject to Article XI, Section 1101: Resignations. Employees shall not be permitted to use sick time during the last two weeks of employment unless a healthcare provider's note is submitted to the Human Resources Personnel.~~
- ~~b. When sick, annual leave, and accrued holiday or compensatory time has been exhausted, any additional leave will be without pay.~~
- ~~c. Employees with continuous service who leave City employment, and qualify to receive payment of unused sick leave credits, may be paid a percentage of their existing sick leave balance in accordance with the table shown below:~~

Less than 5 Years of Service	0%	10 Years of Service	40%
5 Years of Service	30%	11 Years of Service	42%
6 Years of Service	32%	12 Years of Service	44%
7 Years of Service	34%	13 Years of Service	46%
8 Years of Service	36%	14 Years of Service	48%
9 Years of Service	38%	15 Years of Service	50%

~~Note: Payment for unused sick leave balances for contract employees will be in accordance with the contract in effect at the time of separation.~~

- ~~d. Employees who are rehired by Madeira Beach after having previously worked for the City are not entitled to receive credit for unpaid sick leave hours related to the previous period of employment.~~
- ~~e. Payment of unused sick leave credit is paid in a lump sum at the regular hourly rate in effect at the time of separation. This payment is not considered as salary in determining the average final compensation of an employee in the State administered retirement system. There is a lifetime maximum payout of *** sick leave hours for all eligible employees.~~
- ~~f. Employees shall forfeit all sick leave payouts under this section if employment terminates because the employee:

 - ~~(1) Has been found guilty in a court of competent jurisdiction of committing, aiding, or abetting any embezzlement or theft from the employee's employer or bribery in connection with the employment; or~~~~

- ~~(2) Has been terminated by reason of the employee having admitted to committing, aiding, or abetting an embezzlement or theft from his or her employer or by reason of bribery; or~~
- ~~(3) Is adjudged by a court of competent jurisdiction to have violated any state law against strikes by public employees; or~~
- ~~(4) Has been found guilty by a court of competent jurisdiction of violating any state law prohibiting strikes by public employees; or~~
- ~~(5) Was terminated for having committed any felony with the intent to defraud the public or a public agency of the right to receive the faithful performance of his or her duty as a public officer or employee, realizes or obtains, or attempts to realize or obtain, a profit, gain, or advantage for himself or herself or for some other person through the use or attempted use of the power, rights, privileges, duties, or position of his or her public office or employment position.~~
- ~~(6) The forfeiture of leave payout pursuant to this policy is supplemental to any other forfeiture requirements related to public officers or employees provided by law.~~
- ~~(7) Forfeiture shall also occur where the employee resigns from employment after having been charged by the City or other law enforcement authority with any of the above acts but prior to having been terminated.~~

Attorney Eschenfelder said the entire Section VII.B.12 would be taken out. It deals with sick leave payout. The City will not be doing it anymore. Section VII.B.13. would become VII.B.12.

~~13.~~ 12 Notwithstanding any provision of this Policy referring to "calendar year," accruals of leave balances shall be governed by the City's adopted payroll tracking system and may be calculated by the payroll calendar year used by that system.

Chair Cantrell said they have 30 minutes remaining and are roughly halfway through the document. He asked if they wanted to meet again in February. The Commission agreed to meet again at their scheduled meeting on March 7 from 4:00 p.m. to 7:00 p.m. and try working through VII, VIII, IV, and X.

The attorney suggested not reading the text. Chair Cantrell said they need to be clear on what is being changed if they do not read the text.

C. Personal Medical Appointment Leave

1. With prior approval, Personal Medical Appointment leave allows eligible employees to attend personal medical-related appointments when it is not possible to arrange for appointments during off-duty hours.
2. Approved personal medical appointment leave is charged to an employee's sick leave account. Personal medical appointment hours are not considered hours worked towards overtime.
3. Personal medical leave will be recorded appropriately on the timecard (i.e., sick, FMLA, or no pay), in accordance with established pay codes for such leave. Where applicable, use of this leave will also be classified as FMLA protected and recorded as such. Departments are responsible for ensuring that FMLA coverage be documented where applicable.
4. Since medical facilities have varying waiting periods for appointments, there is no set limit for the number of hours for an appointment. The employee should give his/her best estimate at the time of submission of request to the department.
5. Only the time used for the medical appointment, plus travel time to and from the appointment, may be coded as personal medical appointment leave. In addition, where the appointment is for an invasive medical test requiring pre-test preparation or a recovery period which causes an employee to be unable to report for duty, such preparation or recovery time may also qualify as personal medical appointment leave.
6. If there is a question that an employee may be abusing personal medical appointment leave, the department director may require verification of appointments.

Chair Cantrell asked if paragraph 6 was something HR needed to be involved in or if the department directors would make their notes. Attorney Eschenfelder said it was appointment verification, not asking for medical information. It was to make sure the benefit was not being abused.

7. Requests for personal medical appointment leave should be submitted with as much lead- time as possible. Personal Medical Appointment Leave may not be used for worker compensation examinations, treatment, etc., which must instead be coded as worker compensation leave.
8. If covered under the Family and Medical Leave Act, as evidenced through execution of adequate certification and employer response forms, personal medical appointment leave will not be used in evaluating an employee's performance.

D. Bereavement Leave

1. Paid leave may be authorized for probationary and regular employees (OPS employees are ineligible) who have a death in their "immediate" families (see 2. below). The

following procedures apply:

- a. Bereavement leave may be authorized (excluding holidays if scheduled to work the holiday) for up to * scheduled workdays (* days for employees working four 10 hour shifts) with the exception of Fire/EMS 24/48 hour employees, who may be authorized to receive up to two shifts (not to exceed 48 hours) and 12 hour shift employees may be authorized to receive up to four shifts not to exceed 48 hours.

Chair Cantrell asked how many days are currently provided for bereavement leave. The City Manager said in-state bereavement is three days and out-of-state is five days. Under the Fire Union Agreement, it is one shift for in-state and two shifts for out-of-state.

- b. Bereavement leave is separate and distinct from other types of leave and is not chargeable to any accrued leave balance (i.e., sick, vacation, etc.). Bereavement leave does not count as hours worked towards overtime.
- c. In the event a family death occurs during an employee's approved sick, vacation or compensatory time leave, the time missed due to the death may be designated as bereavement leave, if eligible. The actual leave account charged (i. e., sick, vacation, etc.) can be adjusted through a request from the department director to the Human Resources Staff.
- d. Bereavement leave is paid in accordance with scheduled workdays. ~~including premium pay differentials if applicable.~~

Chair Cantrell asked to remove "including premium pay differentials if applicable" in paragraph d because it was not necessary.

2. Definition of Immediate Family

For the purpose of administering this type of leave, "Immediate Family" is defined as the following persons, as related by blood or law to the employee and/or the employee's spouse: spouse, child, stepchild, foster child, grandchild, parent, step-parent, grand or great grandparent, step-grand or step-great grandparent, brother, sister, half-brother, half-sister, step-brother, step-sister, or legal guardian. The definition also includes an individual for whom the employee or the employee's spouse is the legal guardian, and any other family member of the employee or of the employee's spouse who was a full-time resident in the employee's household immediately preceding the death.

Chair Cantrell asked if they could add a statement to paragraph 2 that the director could use discretion. If known that an unmarried couple has been living together for an extended time it could be granted to that person. Commissioner McLaughlan felt the last sentence of paragraph 2 captures what Chair Cantrell was looking for.

3. Proof of Purpose of Leave

Validation of the request is left to the discretion of the employee's department director.

E. Military Leave

1. For purposes of interpreting this Section, the general term "Military Leave" includes both Military Leave, as provided for in subsection (2) below, and Military Call, as provided for in subsection (3) below.
2. Military Leave: In accordance with Chapter 115, Florida Statutes, City employees who are commissioned reserve officers or reserve enlisted personnel in the United States military or naval service or a member of the National Guard, shall, upon presentation of a copy of the employee's official orders, be granted military leave on all days during which the employee is ordered to active duty or inactive duty for training. Such employees shall not be required to work or use accrued personal leave on any day during which they are engaged in training under official orders. Whether continuous or intermittent, such leave with pay may not exceed 240 working hours in any one annual period beginning January 1 and ending December 31. Administrative leave of absence for additional or longer periods of time for assignment to duty functions of a military character, including assignments under applicable FEMA or USERRA regulations, shall be without pay unless required by federal law.
3. Military Call: City employees who are commissioned reserve officers or reserve enlisted personnel in the United States military or naval service or members of the National Guard, who are ordered to active military duty shall, upon presentation of a copy of the employee's official orders, be granted military leave beginning with the day ordered to duty and ending up to 31 days after the date of release from the military service or from hospitalization continuing after discharge, unless a longer period is required by the FMLA. The first thirty (30) calendar days of such leave shall be with full pay. (Note: Employees would only be compensated for scheduled workdays during this 30-day period.)
4. Scheduled workdays for which Military Leave is taken under the rules outlined in subsections (2) and (3) above will be compensated as Military Leave or Military Call (as applicable) and will not count towards overtime. If an employee approved for Military Leave is scheduled to work a shift which qualifies for premium pay differential, Military Leave hours will be compensated at the appropriate premium pay differential rate.
5. Employees requesting Military Leave shall furnish the department director with competent orders from the appropriate military command as valid evidence of such duty status. These orders shall be kept in the employees' departmental personnel file. Since "competent orders" are not always defined or consistent, department directors should consult with the Human Resources Department for guidance.

6. Any absence in excess of the limits set in subsections (2) and (3) above may, upon request by the employee and approval by the appropriate supervisor, be covered by accrued vacation leave, accrued comp. time or personal holiday. If not requested by the employee or approved by the appropriate supervisor as vacation, comp. time, or personal holiday, such absences in excess of the limits shall be approved as military leave without pay. However, such leave shall be without loss of seniority, time or efficiency rating. Should any portion of the leave be paid leave, the employee shall be entitled to accumulate all benefits granted under paid leave status.
7. Madeira Beach employees called to active military service will not be discharged, reprimanded, or in any other way penalized because of their absence due to such service. The employee's position may be filled by another employee with substitute or temporary status. Upon separation from the military service, the employee shall be eligible to return to the former position held or a different position in the same class in the same geographic location.
8. Veteran's Leave: A City employee filling a regular established position and who has been rated by the United States Department of Veterans Affairs or its predecessors to have incurred a service-connected disability and has been scheduled by the United States Department of Veterans Affairs to be examined or treated for the disability, shall be granted veteran's leave for such reexamination or treatment without loss of pay or benefits. The maximum veteran's leave authorized for this purpose shall not exceed six (6) calendar days in any one annual period beginning January 1 and ending December 31. Hours used are not counted as hours worked toward overtime.
9. Issues of military leave not addressed in this policy shall be resolved as provided for state employees in applicable provisions of the Florida Administrative Code, Florida Statutes, and federal law.

F. Jury Leave

1. Whenever an employee (full-time, part-time or temporary OPS) is called for jury duty, upon presentation of the summons to his/her supervisor, the employee will be excused from scheduled workdays and will receive Jury Leave pay for hours actually performing such duty, but not exceeding their scheduled work hours. The employee will not be compensated by the City for Jury Leave on unscheduled workdays unless the employee requests to substitute a night or weekend shift or portion thereof immediately preceding or following jury duty. The employee keeps any jury fees received.
2. Paid Jury Leave hours are considered as hours worked for all compensation purposes including calculating hours worked towards overtime. The City does not reimburse an employee for meals, lodging, travel, or any other expenses incurred as a juror.
3. Employees are required to report to work if excused from jury duty during their regular

- working hours. However, if their scheduled shift has been filled or they are not otherwise needed to complete the shift, they may, with supervisory approval, charge the balance of their scheduled work hours to their vacation or compensatory time leave accounts, or take the time off without pay, but only to the extent they are not able to make up regularly scheduled hours by means of flex time assignment.
4. An employee called to jury duty shall promptly notify his or her department director and provide a copy of the court summons so that arrangements may be made in advance for his or her absence from work. When requested by an employee's department director, an employee will provide the director with a statement of actual days spent on jury duty service (such as by memo or e mail) before compensation is approved. Where the Clerk of Court engages in "day prior call in" programs (where unseated jurors call a number to determine whether their presence will be needed the next day), employees who discover their presence at the courthouse will not be required the following day (but who have not yet been released from duty) shall report to work on that day unless otherwise ordered by the Court. Once an employee is released from duty, he or she shall inform the department and report to work as required in Paragraph ~~4~~ 3 above.
 5. An employee called to jury duty while on vacation leave shall be allowed jury duty pay for that time served in court which corresponds to his or her regular workday. Such employee shall have his or her vacation leave hours restored provided satisfactory evidence of the time served on jury duty is presented to the department. In the event a holiday occurs during the period an employee is serving on jury duty, he or she shall receive holiday pay for the holiday rather than jury duty pay.
 6. Employees who have a normal work schedule outside the regular business day (night or weekend shifts) who are summoned for jury duty during the business day immediately following the scheduled shift shall, if they request, be permitted to be excused from their scheduled work shift (or portion thereof) immediately prior to the jury duty day, in order to rest or otherwise prepare for their jury service. However, such excused period shall not exceed 8 hours and, where an employee requests to be excused from work for a portion or all of a scheduled shift, the employee shall not be compensated for the shift or portion thereof, not actually worked (unless vacation leave is used) but shall only be compensated for jury duty equal to the number of shift hours missed performing such duty. Notwithstanding the general requirement for employees to report to duty should they not be required to spend an entire day of jury duty service, night/weekend shift employees who serve any portion of a day for jury duty without taking time off their regular shift shall be paid for the entire shift, not to exceed the number of work hours scheduled.

Attorney Eschenfelder said Section F states that if an employee is summoned to jury duty, the City will excuse them. They will receive jury leave pay for hours spent performing jury duty but not exceeding their scheduled work hours.

G. Witness Leave

1. An employee appearing as a witness for the City in a court case or administrative proceeding within the boundaries of Pinellas County, in which the City is a party, including depositions, post-termination proceedings, mediation or arbitration proceedings, or who is subpoenaed as a witness in a court case or administrative proceeding in which the employee's testimony is related to official City business, is considered to be on duty during such appearance (not including travel time), even during off-duty hours. The employee must remit to the City any witness fee received in connection with the appearance. In the event the litigation is in a forum outside Pinellas County, and the employee attends as a witness for Madeira Beach, he/she shall be entitled to per diem expenses in accordance with Florida Statutes § 112.061. However, in the event the litigation is in a forum outside Pinellas County, and the employee is subpoenaed by a party other than Madeira Beach, the employee may keep any reimbursement of travel expenses, and he/she shall not be entitled to reimbursement of per diem expenses from the City.
2. An employee who voluntarily appears at a court or administrative proceeding, as defined above, on behalf of a party litigating against the City shall be ineligible for witness leave pay by the City for any time spent at such proceeding and must attribute such time to appropriate available leave balances or take leave without pay.

Attorney Eschenfelder said if an employee voluntarily appears in court to testify against the City, they would not be paid. Chair Cantrell asked if they would be paid if subpoenaed. Attorney Eschenfelder said yes because they would be compelled to be there.

3. An employee who becomes a party in or appearing as a witness in any case other than those described in Paragraph 1. is considered to be off duty and must attribute such time to appropriate available leave balances or take leave without pay. Under such circumstances, the employee is entitled to keep any witness fee received. The only exception to this provision is where a City EMT or Paramedic who, while off duty, renders medical aid or assistance at an accident scene or emergency event and by so doing becomes a witness. In such cases, the EMT or Paramedic will be paid as described in Paragraph 1. above.

H. Disability Leave

Note: Family and Medical Leave Act (FMLA) eligibility will be considered and may run concurrently with Disability Leave. (See FMLA Section: VII.L.)

1. Workers' Compensation

- a. An employee who suffers accidental injury arising out of work performed in the course and scope of City employment may qualify for benefits during periods in which the employee is unable to work, as provided in the Workers' Compensation Law, F.S. Chapter 440. Any employee who has suffered an injury or illness while

at work is required to report that injury or illness on an appropriate City form as soon as possible. Supervisors or managers who are aware of such illness/injury are required to provide the appropriate form to the employee, to compel the employee to complete it, and to promptly report the incident to the director and risk management.

- b. The City's risk management staff administers all workers' compensation claims and benefits.

Vice Chair Ponte asked if the City has risk management staff. Attorney Eschenfelder said it is a generic term and collectively includes City paid employees and the worker's compensation insurance carrier. The Commission suggested revising subsection b to give reference to who the risk management staff includes.

- c. An employee receiving workers' compensation wage benefits may, at the employee's election, use available leave balances, in accordance with Section VII.B.7, to supplement those benefits. The supplemental payments plus workers' compensation benefits cannot exceed the employee's regular salary. Time spent by an employee accessing treatment for a workers' compensation covered injury does not count as hours worked toward overtime.
- d. An employee who is released to light duty by the workers' compensation primary care provider may, at the discretion of the department director, be assigned to perform other than his/her regular duties during recuperation. An employee who refuses to accept a light duty assignment will be ineligible for other disability leave, may lose workers' compensation benefits, and will be subject to disciplinary action under Section XI. of the policy.

Chair Cantrell asked if Section VII.B.11 could be cross-referenced to Section VII.H.1.d. Attorney Eschenfelder said he would do that.

- e. An employee who refuses to return to work after being released to unrestricted full duty by the workers' compensation primary care provider will be subject to discipline, including discharge, or may be deemed to have abandoned his/her job and resigned.
- f. Nothing in this sub-section eliminates or reduces an employee's rights under Florida law to appeal workers' compensation decisions, nor should it be read as guaranteeing light duty work. Where no bona fide light duty work is available within the employee's department, the employee may be required to remain out of the workplace until recuperated. While no employee will be retaliated against for having submitted a claim for benefits and will give every opportunity for employees to recover from work-related injuries, the City reserves its right under law to terminate any employee for the inability to perform the essential functions of his or her job where the needs of the City so require. (See Section IX-E).

[At the next meeting, the Civil Service Commission will begin their discussion on page VII, 15. H. 2. Short-Term Disability Leave / Reasonable Accommodations / Fitness for Duty Exam]

8. ITEMS TO BE SCHEDULED FOR FUTURE MEETINGS

The Commission addressed each item and gave the status. The City Clerk will note the status of each item listed on the agenda:

A. Ordinance 2023-06, Amendment to Civil Service Commission Rules

Chair Cantrell said they needed to finish addressing the policy before addressing the ordinance because some of the amendments to the Civil Service rules directly relate to the policy.

- B. Classification of all Classified City Positions, based upon the Duties, Authority, and responsibility of each position, with adequate provisions for classification of any position whenever warranted by circumstances (City Charter, Sec. 5.7, C, 1) – **In process**
- C. Pay Plan for all Classified City Positions (City Charter, Section 5.7, C, 2) – **In process**
- D. Methods for determining Merits and Fitness of Candidates for Appointment or Promotions (City Charter, Section 5.7, C, 3) - **Verify redlines in policy on March 7th, then decide to remove the item.**
- E. Grievance procedures, including procedures for hearing grievances by Civil Service Commission, which may render advisory opinions based on its findings to the City Manager with a copy to the aggrieved employee. In this respect, the Civil Service Commission shall have the power to issue subpoenas to compel attendance by witnesses and to administer oaths (City Charter, Section 5.7, C, 6) - **Addressed at the recent joint BOC meeting. The ordinance will go forward at the same time the policy goes forward. The item can be removed.**
- F. Implementation Process for making sure that all Rules, Regulations, and Procedures of the Employee Personnel Policy are working and are followed by everyone (City Charter, 5.7, C, 8) - **This item to be addressed in Ordinance 2023-06, Civil Service Commission Rules.**
- G. Department Specific Rules – **For review at a future meeting**
- H. Ex Officio Board Member – **Robert's Rules of Order – City Clerk to schedule training – All Board members are invited**
- I. Employee Satisfaction Surveys – **Address after Personnel Policy is adopted**
- J. Employee Termination Survey – **Address after Personnel Policy is adopted**
- K. Exit Interview Survey – **Address after Personnel Policy is adopted**
- L. HR Director Position – **Address after Personnel Policy is adopted**

- M. PowerPoint History Presentation- Civil Service Commission beginning when it was first created by the City of Madeira Beach Voters - **Address after Personnel Policy is adopted**
- N. Review of Offer Letter - **Address after Personnel Policy is adopted**
- O. Document Control – **Addressed. Remove from list**

9. NEXT MEETING

The Civil Service Commission scheduled their next meeting for March 7, 2024, from 4:00 p.m. to 7:00 p.m.

10. ADJOURNMENT

Chair Jerry Cantrell adjourned the meeting at 6:09 p.m.

ATTEST:

Jerry Cantrell, Chair

Clara VanBlargan, City Clerk/Secretary Ex-Officio



Request For Proposal:

#2024-01 HR Classification and Compensation Plans Study
City of Madeira Beach
300 Municipal Drive
Madeira Beach, FL 33708

Submitted By:

AutoSolve, Inc.
313 S Forest Dune Drive
Saint Augustine, Florida 32080

Due: 2/9/2024 at 3:00pm

Table of Contents

COVER LETTER 4

BACKGROUND..... 5

 WHY AUTOSOLVE 5

 CORE VALUES 5

 PUBLIC SECTOR FOCUS..... 6

 SAMPLE OF RELEVANT PROJECTS. 6

 SAMPLE OF RELEVANT PEERS FOR CITY OF MADEIRA BEACH 7

 SAMPLE OF IMPROVEMENT OPPORTUNITIES IN RELEVANT PROJECTS..... 7

CONTACT INFO AND PROJECT TEAM..... 8

PROJECT LEADERSHIP 8

PROJECT TEAM..... 9

PROJECT GOALS, OBJECTIVES, AND OUTSIDE DATABASES 10

 COMMUNICATION AND INTERACTION 10

 SCOPE OF WORK 10

 CLOUD SURVEY PLATFORM..... 11

 KEY DATABASES 11

WORK PLAN METHODOLOGY 12

WORK PLAN BREAKDOWN 13

 PROJECT INITIATION / KICK OFF..... 13

 CURRENT PAY PLAN/PHILOSOPHY EVALUATION 13

 CLASSIFICATION EVALUATION – INTERNAL SURVEYS, JOB DESCRIPTIONS - INTERNAL EQUITY 14

 COMPENSATION EVALUATION – SALARY SURVEY - EXTERNAL EQUITY 14

 BENEFITS SURVEY - EXTERNAL COMPETITION 15

 CLASSIFICATION GRADING..... 15

 EMPLOYEE COMPENSATION MANAGEMENT SYSTEM / CUSTOM PAY PLAN 16

 IMPLEMENTATION OPTIONS 16

 FINAL REPORT, SYSTEM TRAINING 16

 COMPLEMENTARY SIX (6) MONTHS SUPPORT/MAINTENANCE 17

 YEARLY MAINTENANCE 17

PROJECT AVAILABILITY AND TIMELINE 18

 FIRM AVAILABILITY 18

 ASSUMPTIONS 18

 TIMELINE..... 18

REFERENCES..... 19

 REF 1: CITY OF AMERICUS, GEORGIA – CLASSIFICATION AND COMPENSATION STUDY..... 19

 REF 2: CITY OF BOLDER CITY, NEVADA – CLASSIFICATION AND COMPENSATION STUDY 19

 REF 3: TOWN OF LONGBOAT KEY, FLORIDA – CLASSIFICATION AND COMPENSATION STUDY..... 19

 REF 4: GROWFL (NOT FOR PROFIT) / UNIVERSITY OF CENTRAL FLORIDA, ORLANDO, FLORIDA – HR STRATEGY CONSULTING..... 19

 REF 5: FLORIDAMAKES (NOT FOR PROFIT) ORLANDO, FLORIDA – HR STRATEGY CONSULTING 19

COST OF SERVICE 20

FINAL PRODUCT.....	21
EXHIBIT A: SAMPLE PROJECT REPORT EXAMPLES.....	22
EXHIBIT A.1: MARKET RESULTS TABLE	22
EXHIBIT A.2: MARKET RESULTS TABLE CONTINUES	23
EXHIBIT A.3: NUMBER OF RESPONDENTS	23
EXHIBIT A.4: PROPOSED PAY PLAN GENERAL EMPLOYEES	24
EXHIBIT A.5: NEW PROPOSED PAY PLAN: SAFETY EMPLOYEES	24
EXHIBIT A.6: STEP PLAN	25
EXHIBIT A.7: IMPLEMENTATION OPTIONS	25
EXHIBIT A.8: PAYGRADE ASSIGNMENT TABLE.....	26
EXHIBIT A.9: EMPLOYEE COMPENSATION MANAGEMENT SYSTEM	26
EXHIBIT A.10: IMPLEMENTATION OPTION DESCRIPTIONS	27
EXHIBIT B – CITY OF MADEIRA BEACH ATTACHMENT	28
EXHIBIT C – INSURANCE CERTIFICATE.....	31
EXHIBIT D – REFERENCE LETTER - MS. HANNAH METEVIA - GROWFL.....	32

Cover Letter

February 7, 2024

Robin I. Gomez, City Manager
City of Madeira Beach
300 Municipal Drive
Madeira Beach, FL 33708
Phone: 727-580-8014 Email: rgomez@madeirabeachfl.gov

Re: #2024-01 HR Classification and Compensation Plans Study

Dear Robin,

We are pleased to submit this proposal to work with the City of Madeira Beach on the HR Classification and Compensation Plans Study. We are excited to share our passion for strategic workforce staff planning and custom pay plan development. We look forward to the opportunity to work as your partner and achieve success together. We are a local Florida firm located in Saint Augustine with a satellite location in Tampa only 24 miles away from the City of Madeira Beach.

The goal of this study is to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. The study will focus on approximately 83 full time employees and approximately 69 classifications / job titles. The City of Madeira Beach serves a population of approximately 3,895.

AutoSolve, Inc. (AutoSolve) is an experienced Management Consulting firm that has been providing consulting services to private and public agencies for more than 30 years. Our success has been contributed to our ability to continuously deliver value to our clients. We have an exceptionally qualified staff assigned to the engagement. The AutoSolve team will listen, collaborate, and communicate effectively with your team to ensure that we develop a custom pay plan that is both internally equitable and externally competitive. We will have all work completed within 3 months of starting and our target completion date is 7/19/2024.

All work will be performed by AutoSolve employees. If you need any additional information as you consider your options, please let me know.

This proposal will remain valid for ninety (90) days from the date of submittal.

Thank you for your time and consideration,



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

Background

AutoSolve, Inc. (AutoSolve) is a boutique strategic Managerial/HR 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.

Why AutoSolve.

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 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. We strive to provide expertise in organizational design and compensation structure that addresses each of our client's individual needs. This strategy allows us to account for the geographic and economic contexts that influence the individual circumstances of our clients.








Core Values

Our core values guide the way AutoSolve makes decisions and conducts business. Here at AutoSolve, all employees aim to exemplify our core values in their work with our 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.

Public Sector Focus.

AutoSolve has been serving local governments and other public sector organizations since its inception.

 Municipalities	 Not for Profit	 K-12 School Districts
 County Governments	 Higher Education Institutions	

Sample of Relevant Projects.

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

Sample of Classification and Compensation Projects	State	Employees	Classification / Job Titles
Bedford County	VA	169	81
Carbon County	PA	386	198
Charlottesville City School District	VA	1,000	182
City of Americus	GA	185	77
City of Boulder City	NV	1,520	160
City of Fayetteville	GA	180	85
City of Hagerstown	MD	125	48
City of North Miami Beach	FL	294	60
Fayette County Public Schools	KY	3,504	230
Florence School District 3	SC	495	89
Goochland County	VA	296	163
Harrisonburg City Public Schools	VA	960	226
Kansas City Public Schools	MO	2,500	359
Leon County Clerks of the Circuit Court	FL	124	57
Lex-Rich District 5	SC	964	137
Liberty Public Schools	MO	993	127
Madison County	GA	459	98
Orange County	FL	2,841	260
Raytown C-2 School District	MO	637	130
Rock Hill Schools	SC	2,400	254
School District of Beloit	WI	758	218

Sample of Relevant Peers for City of Madeira Beach

AutoSolve is very familiar with the local government agencies in this region. We are a local Florida firm located in Saint Augustine with a satellite location in Tampa only 24 miles away from the City of Madeira Beach. The following is a sample list of relevant peers for this compensation and classification project. City of Madeira Beach population 3,895 and operating budget of \$47,660,092. We will jointly agree on 10 to 15 comparable organizations to be surveyed.

Sample of Relevant Peers	State	Population	Agency Budget	Distance (Miles)
City of Clearwater	FL	116,674	\$724,184,306	12.3
City of Dunedin	FL	35,949	\$133,282,528	17.7
City of Indian Rocks Beach	FL	4,394	\$4,813,030	8.0
City of Largo	FL	82,485	\$258,312,500	8.7
City of Pinellas Park	FL	53,093	\$232,700,000	9.0
City of St. Petersburg	FL	264,220	\$364,467,000	11.7
City of Tampa	FL	387,050	\$2,213,431,114	27.0
City of Tarpon Springs	FL	25,560	\$76,310,953	29.1
City of Treasure Island	FL	6,584	\$45,810,120	2.7
Hillsborough County	FL	1,459,762	\$9,120,000,000	39.1
Pinellas County	FL	959,107	\$3,881,000,000	6.4
Town of Indian Shores	FL	1,190	\$5,183,820	5.6
Town of Redington Beach	FL	1,376	\$2,027,614	1.1
Town of Redington Shores	FL	2,176	\$9,264,240	2.8

Sample of Improvement Opportunities in Relevant Projects.

Compression / Compliance

At the start of the study, we performed a deep dive analysis on the city’s current compensation system. Informed by this detailed analysis, our team then recognized and addressed compression issues. One finding from this analysis was that 4 employees were being compensated below their current paygrade minimum. We immediately provided the city with data that allowed for corrective action to take place and to resolve a non-compliance issue.

Compression / Custom Pay Plays

In a prior project, we found that a city was utilizing only one pay plan for all their employees. This led to compression issues and employees being inadequately compensated compared to their operating market. We corrected this issue by creating pay plans for each department/employee group that was then implemented by the client. The deliverable was a customized compensation system for the city.

Internal Survey / Classifications

We performed an internal, individual employee assessment survey that collected current job duties and responsibilities for job classifications from the city’s employees. The survey analysis revealed that 3 city employees were working in the wrong job classification and performing duties outside of their designated positions and failed to align with their job description. This issue was corrected via a re-classifying of said employees.

Contact Info and Project Team

Company - S Corporation: AutoSolve, Inc.

FEIN: 59-3212545

Primary Contact: Jeff Turner

Phone: 321-945-8762

Email: jeff@autosolveinc.com

Address: 313 S Forest Dune Drive, Saint Augustine, Florida 32080

Contract Relationships: All work will be performed by AutoSolve employees.

Our expert project team will be able to provide value from day one. Below is a description of the project team.

Project Leadership



Jeff Turner, PMP, B.S. 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 targeted at executive leaders to build company value with a focus in human resource management, classification and compensation studies, organizational design, business process reengineering, strategic planning, and succession planning.

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 is a Society for HR Management Professional (SHRM).

Project Team

Alex Turner, M.S. Finance – Senior Compensation Consultant



Alex Turner has 5 years of experience and is focused on delivering classification and compensation studies working as a Senior Compensation Analyst. Through his experience Alex has provided classification and compensation studies, market research, staffing studies, performance reviews and gender and race audits to over 40 different state and local governments, K-12 public school districts, and higher education institutions across the country.

Alex's expertise includes data analytics, financial modeling and forecasting, strategic planning, and management reviews. Alex provides quantitative analysis on all projects.

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, PhD. Candidate – Senior Consultant



Sidney Turner has been working in higher education for the past 7 years as instructor and administrator. Currently completing her Ph.D. in Composition and Cultural Rhetoric, she has a background in technical communication, conducting research, organizational design, and curriculum development.

Sidney provides qualitative analysis on all projects and supports updating job descriptions.

She received her Master's in Rhetoric and Composition and Bachelor of Science in Political Science and Literature from Florida State University.

Christopher Young, B.S. Information Technology - Systems Analyst



Christopher 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 also supports updating job descriptions.

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

Project Goals, Objectives, and Outside Databases

A classification and compensation study aligns your people strategy with your business strategy. The objective of every organization is to optimize the workforce for today while proactively planning for future resource needs. AutoSolve will review internal equity pay relationships between positions and external competitiveness pay relationships with labor market competitors. Our team will provide quantitative numerical data analysis along with qualitative interpretation-based analysis.

We understand that every organization is different and has their own unique goals and concerns. We strive to provide a tailored made solution addressing your organization's individual wants/needs. The following objectives and methodology outlined with this document are a road map for completing the classification and compensation study.

Communication and Interaction

- All work will be done with regular involvement of the City of Madeira Beach Project Team. Additional key personnel, identified by the City of Madeira Beach Project Team, will be included.
- The project initiates with a kickoff meeting to review the process and tasks to be performed by the study.
- Schedule weekly touchpoint meetings to discuss the project and review the work plan.
- Provide weekly updates on the progress of the project.
- Schedule as needed meetings with department heads.
- Incorporate feedback into the process.
- Jointly agree on comparable organizations to be surveyed.
- Work with management during all phases of this project, including an onsite visit to present final recommendations to the City Council.

Scope of Work

Conduct comprehensive classification and compensation study. The study shall evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors.

- We will review and evaluate Human Resources/Personnel processes relative to all City job classifications and compensation.
- We will review and evaluate all current job classifications to ensure compliance with federal, state, and local laws and regulations including the Fair Labor Standards Act, exempt/non-exempt classifications, and all other applicable personnel provisions.
- We will review all current job classifications, confirm, and recommend changes to hierarchical order of jobs using your evaluation system.
- We will establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions as required.
- We will identify potential pay compression issues and provide potential solutions.
- We will analyze and recommend changes to the present compensation matrix and/or structure to meet the market analysis. This recommendation will include recommendations for individual positions.

The study will focus on approximately 83 employees and approximately 69 classifications / job titles.

Cloud Survey Platform

AutoSolve has its own secure cloud survey platform providing a quality customer centric experience for the organization survey and the individual employee survey. The AutoSolve Cloud Survey Platform is developed and maintained by AutoSolve employees.

Key Databases

We understand that the key to a successful study relies on the quality of data utilized. In addition to the internal and external surveys, we utilize key databases to ensure comprehensive, balanced, and accurate results. Below is a description of the outside databases we utilize along with the client's operating market compensation data.

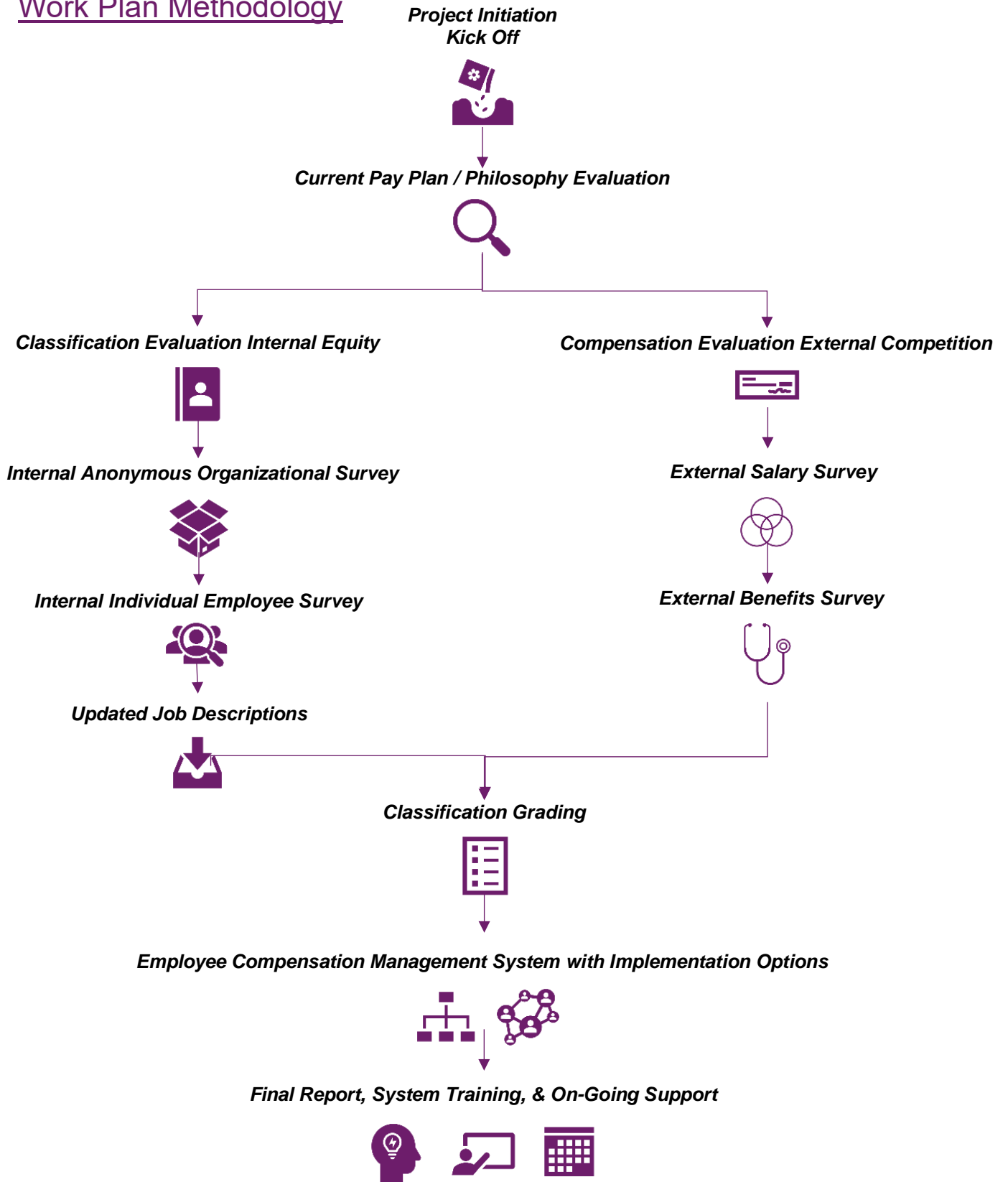
Economic Research Institution (ERI)

Provides access to private 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.

The Council for Community and Economic Research (Cost of Living Index)

Provides up to date cost of living data for over 3,000 different counties and urban areas. We utilize this database to adjust peer market data to the cost of living of the client organization. This allows an "apples to apples" analysis of salary ranges found within the organizations competitive market, making for a better recommendation to the client.

Work Plan Methodology



Work Plan Breakdown

Project Initiation / Kick Off

The project 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.



- 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.

Deliverables: Excel file detailing the finalized project plan with agreed upon deliverables and timeline.

Current Pay Plan/Philosophy Evaluation

We will review the organization's current classification and compensation plan and then meet to discuss the organization pay plan philosophy. Key recommendations will be derived from the data analysis on the current pay plan data provided.



- 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 in respected to their assigned salary range.
- Analyze the expected pay based on tenure.
- Analyze pay compression within the current pay plan system.
- Meet with the organization's project team to discuss the pay plan/philosophy.
- Provide recommendations to better align client pay plan system to current best practices.

Deliverables: PDF report outlining and illustrating the current workforce classification system and pay plan philosophy creating a foundation for both the classification and compensation reviews.

Classification Evaluation – Internal Surveys, Job Descriptions - Internal Equity

We conduct 2 internal surveys to gather feedback from employees. The anonymous internal organizational survey helps us to understand the employee sentiment within the organization. The internal individual employee survey provides us with the most up to date job duties and information that will arm us with the knowledge to create/update job descriptions and assist job grading/hierarchy matrix. Both surveys are conducted in our secure cloud survey platform providing a quality customer centric experience. We will conduct employee focus group and department head interviews as needed.



- Meet with the organization’s project team to review and designate appropriate scheduling to conduct both the internal organization survey and the individual employee survey.
- Provide login credentials for all participating employees in the study.
- Conduct an anonymous online internal organizational survey for each current employee to participate in, to better assess positives and negatives of the organization’s benefits, current compensation system, culture, etc. from their employee’s perspective. This allows the employees to participate in the study and have their concerns about the organization heard.



- 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).



- Position Descriptions Questionnaires (PDQ’s). Conduct an online internal individual employee survey. This survey allows us to gather current job responsibilities, duties, education level, required certification, etc. for each classification involved within the study. This survey is the basis for performing job audits, conducting our internal classification grading, and updating job descriptions. The survey calls for full employee participation. PDQ question examples: Name, Job Title, Department, Supervisor Responsibility, Education Level, Required Certification, Other Certifications, Job Duties, Type of Work, and Leadership Responsibility questions.



- Create updated job descriptions utilizing the findings from the individual employee survey and organization’s project team insight.
- Review updated job descriptions with organization’s project team and make revisions. Provide final job descriptions in word format after the completing revisions.

Deliverables: PDF breaking down findings from both conducted surveys, interviews, job audits, and organization’s project team insights. Updated job descriptions provided to organization as a word file.

Compensation Evaluation – Salary Survey - External Equity

We utilize public and private data to support the external equity compensation evaluation which enables us to determine the organization’s operating market. The salary survey serves as the gauge for how competitive the organizations compensation system currently is compared to their operating market and shows us which classification are currently behind in reference to the organizations compensation philosophy. The 3 data sources utilized are salary survey of 10-15 peer organization, the Council for Community and Economic Research (Cost of Living Index) database, and the Economic Research Institute (ERI) private sector salary databases.



- Meet with organization’s project team to identify and reach 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 organization’s project team to strategically create a comprehensive list of organization’s positions to survey with appropriate descriptions for peer organizations to provide the correct comparative salary ranges. (Best Practices: Maximum of 80 classifications for external salary survey)



- Conduct external salary survey by collecting agreed upon peers' salary range data on strategically picked positions. (Exhibit A.1 – A.3)
- Aggregate and analyze external market survey findings to assess the organization's current compensation system competitiveness within its peer market.
- Adjusting for cost of living to get the most accurate analysis, utilize The Council of Community and Economic Research's database.
- Utilize private sector salary data gathered from the Economic Research Institute (ERI) to assist in creating the proposed compensation system.
- Present analysis and recommendations to the organization's project team to receive integrate feedback.

Deliverables: PDF report summarizing 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



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.

- Meet with organization's project team to identify and reach consensus on a list of relevant peer organizations to be used in the external benefit survey.
- Conduct external benefits survey by collecting agreed upon market peers' benefit data.
- Prepare written and illustrated commentary on organization's benefit offerings compared to collected peer data.

Deliverables: PDF report summarizing benefits survey findings, comparing the organization's current benefits offerings to the survey market peers.

Classification Grading

We utilize data from the internal individual employee survey, and external salary survey to create a corrected classification hierarchy based on updated classification data. The classification hierarchy list is the utilized in creating the proposed pay plan aligning pay with hierarchy eliminating pay compression.



- Incorporating analysis, findings, and recommendation from both the classification review and the compensation review, we utilize a hierarchical scoring mechanism for the placement of positions in the classification system. We will provide recommendation on updating classification placement, addition and deletion as needed.
- The hierarchical grade placement per classification is derived from compensation, job duties, and job impact in the organization and community.
- Meet with organization's project team to present initial classification grading to receive feedback and make revisions.

Deliverables: Excel file containing a list of all classification and its finalized agreed upon grade/placement within the organization

Employee Compensation Management System / Custom Pay Plan

We will create the new custom pay plan to meet the organizations goals/needs and to align the new pay system with current industry best practices. We will recommend and discuss multiple pay plan implementation options.



- Analyze 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. (Exhibit A.4 -A.6)
- Develop recommended strategies for setting hiring rates for new and promoted employees.
- Provide seven or more implementation cost options for the new recommended compensation system. (Exhibit A.7)
- Meet with the organization's project team to present initial system and receive feedback on revising the newly recommended pay scales. (Exhibit A.8)
- Review all implementation options and select the option or options that best fit the needs of the organization.
- Provide a custom employee compensation management system. The employee compensation 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. (Exhibit A.9)
- The system will ensure useability of the recommended compensation system for the next two years.



Implementation Options

We provide a set of initial implementation options as a starting point for the discussion to match the organization's compensation philosophy and business needs. (Exhibit A.7), (Exhibit A.10)

Deliverables: A workable excel file of the employee compensation management system.

Final Report, System Training

We will prepare a final report to include all aspect of the classification and compensation study.



- Prepare a final report illustrating project findings and recommendations derived from project results.
- Present findings and recommendations at a public meeting of the organization's stakeholders at an agreed upon date either in person or virtually.
- Prepare an in-depth manual and training video for maintenance of the recommended classification and compensation plan job management system.



Deliverables: Draft and Comprehensive final PDF report, maintenance/training PDF manual, maintenance/training video.

Complementary Six (6) Months Support/Maintenance

- **Six Months (Free)** maintenance on an as needed basis. Support includes job description updates, applying new hires to the proper pay grade, appropriate employee promotion through their grade, determining if employee should be promoted to a higher grade.

Yearly Maintenance

- **Yearly Maintenance (Additional Purchase Required)** includes job description updated on an as needed basis. Assisting in applying new hires to the proper pay grade. Assisting in how high an employee should be promoted through their grade, or if they should be promoted up a grade. Adjust implemented compensation system to cost of living up to four times in a year. After 1 year, we will conduct an updated Market Survey (Original Peers included in this updated report; up to 5 new jobs surveyed).

Project 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 Project Managers and Consultants are very responsive and will respond to calls and emails within 24 business hours.
- 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 Eastern Daylight Time standard business hours.

Assumptions

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

Timeline

Timeline estimated at 12 weeks.

- Project timeline – 4/15/2024 to 7/19/2024.
- Holiday week – 7/1/2024 to 7/5/2024
- Our timeline is flexible and will adjust deliverable dates, taking into consideration national holidays and vacation schedules.
- We are prepared to start the classification and compensation study within 2 weeks after official notice of award.

City of Madeira Beach - 4/15/2024 to 7/19/2024

Timeline & Milestones	April	May	June	July
Project Initiation				
Kick Off				
Project Management (12 weeks)				
Current Pay Plan Evaluation (2 weeks)				
Classification Evaluation (3 weeks)				
Compensation and Benefit Evaluation (3 weeks)				
Classification Grading / Compensation Management System with Implementation Options (2 weeks)				
Final Report, System Maintenance and Training (2 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:

- In Progress a comprehensive classification and compensation study for the City of Americus, Georgia consisting of 185 employees and 77 classifications.

REF 2: City of Bolder City, Nevada – Classification and Compensation Study

Contact: Mrs. Lourdes Martin

Email: lmartin@bcnv.org

Phone: (702) 293-9203

Services Provided:

- Completed a comprehensive classification and compensation study for Boulder City, NV consisting of over 1,500 employees and 160 classifications.

REF 3: Town of Longboat Key, Florida – Classification and Compensation Study

Contact: Lisa Silvertooth

Email: silvertooth@longboatkey.org

Phone: (941) 316-1999 ext.1610

Services Provided

- Alex completed a comprehensive classification and compensation study for the Town of Longboat Key consisting of over 50 employees.

REF 4: GrowFL (Not for Profit) / University of Central Florida, Orlando, Florida – HR Strategy Consulting

Contact: Ms. Hannah Metevia

Email: Hannah@GrowFL.com

Phone: (407) 476-8375

Services Provided: Multiple engagements 2010 to 2023.

- Provided team leadership, project management and HR strategy consulting for 350 GrowFL / University of Central Florida strategic economic development client engagements. Providing detailed due diligence research for over 400 GrowFL / Florida Company to Watch program finalist.

REF 5: FloridaMakes (Not for Profit) Orlando, Florida – HR Strategy Consulting

Contact: Mr. Dan Sutter

Email: Dsutter@seelevator.com

Phone: (407)-580-6495

Services Provided: Multiple engagements in 2017

- Provided leadership, project management, performance management assessments, custom surveys, continuous improvement, and strategic planning to FloridaMakes strategic economic development client engagements.

Cost of Service

Project Size

Project Size: approximately 83 Full Time Employees, approximately 69 Classifications / Job Titles. Best practices for requesting market data from peers is to limit the number of classifications to a maximum of 80.

Additional classifications can be surveyed based on client need and preference.

Total Proposed Fixed Fee

Total Fixed Fee Not to Exceed: \$29,625.00

City of Madeira Beach Detailed Cost Summary

Tasks	Hours	Cost
Project Initiation	2	\$375.00
Kick Off Meeting		
Project Management (12 weeks)	24	\$4,500.00
Current Pay Plan Evaluation (2 weeks)	28	\$5,250.00
Classification Evaluation (3 weeks)	33	\$6,187.50
Compensation and Benefit Evaluation (3 weeks)	29	\$5,437.50
Classification Grading / Compensation Management System with Implementation Options (2 weeks)	24	\$4,500.00
Final Report, System Maintenance and Training (2 weeks)	18	\$3,375.00
Complimentary Support - (6 months)	0	\$0.00
Total	158	\$29,625.00

Fixed Fee Payment Schedule

Three (3) evenly distributed monthly payments.

The first invoice will be sent after the project kick off meeting.

Optional Maintenance (Yearly)

Year 1 - First 6 month included for no charge; additional 6 months maintenance \$6,000.00.

Year 2 - Maintenance \$12,000.00.

Travel Expense

Anticipated Travel:

Kick of Meeting

One board meeting to discuss recommendations, findings, and final report.

All other meetings will be performed virtually.

Other Expenses

Other reasonable business expenses may be encountered.

If expenses are encountered, approval will be obtained prior to incurring cost.

Expenses will be billed at actual cost accompanied by a receipt of the transaction.

Additional Work

If additional work is authorized, hourly rate \$187.50.

Final Product

In summary, the final product delivery will be provided in 3 main parts.

1. A final report explaining each deliverable, findings, and overall recommendations for the organization.
2. A customized Employee Compensation Management system in excel format and training materials on how to utilize the system to its full potential.
3. Present the steps of the project, project findings, final report, and talk through our recommendations to key organizational stakeholders at a scheduled council meeting.

Exhibit A: Sample Project Report Examples

Exhibit A.1: Market Results Table

Market Results Averages				
Classification	Average Minimum	Average Midpoint	Average Maximum	Average Range Spread
Animal Protection Officer	\$42,630.03	\$55,673.96	\$68,717.88	61.2%
Accounting Analyst	\$41,728.71	\$52,421.12	\$63,113.54	51.2%
Administrative Assistant	\$34,829.35	\$45,664.49	\$56,499.64	62.2%
Animal Shelter Attendant	\$36,793.56	\$47,870.04	\$58,946.53	60.2%
Battalion Chief	\$82,053.21	\$111,603.03	\$141,152.85	72.0%
Building Official	\$81,643.40	\$106,834.83	\$132,026.25	61.7%
Captain	\$76,022.03	\$101,818.19	\$127,614.35	67.9%
Chief Deputy Cor	\$71,603.12	\$92,363.94	\$113,124.76	58.0%
Principal Deputy Court Clerk	\$57,700.12	\$74,855.82	\$92,011.51	59.5%
Comb Commercial Inspector I	\$43,908.69	\$56,665.92	\$69,423.15	58.1%
Comb Residential Inspector I	\$43,908.69	\$56,665.92	\$69,423.15	58.1%
Communications Officer	\$39,483.89	\$51,993.16	\$64,502.43	63.4%
Communications Supervisor	\$51,938.94	\$69,875.10	\$87,811.25	69.1%
Economic Development Coordinator	-	-	-	-
Construction Superintendent	-	-	-	-
Convenience Cntr Attendant I	\$30,669.97	\$39,608.04	\$48,546.12	58.3%
County Attorney	-	-	-	-
Customer Service Center Manager	-	-	-	-
Custodian	-	-	-	-
Customer Service Specialist	\$32,889.86	\$42,746.99	\$52,604.12	59.9%
Deputy Clerk I	\$32,960.21	\$42,696.64	\$52,433.07	59.1%
Deputy Clerk li	-	-	-	-
Deputy Commonwealth Attorney	\$90,215.43	\$125,426.38	\$160,637.33	78.1%
Deputy County Administrator	\$112,952.58	\$152,982.78	\$193,012.99	70.9%

*The Market Results Tables provides the average minimums, midpoints, and maximums from the client's peers as a dollar amount.

Exhibit A.2: Market Results Table Continues

Market Salary Ranges Compared to Demonstration City, FL Salary Ranges

Classification	Average Minimum	Average Midpoint	Average Maximum
Animal Protection Officer	-10.86%	-11.31%	-11.60%
Accounting Analyst	4.80%	8.22%	10.42%
Administrative Assistant	-4.19%	-5.04%	-5.57%
Animal Shelter Attendant	-18.45%	-18.52%	-18.57%
Battalion Chief	-8.69%	-13.19%	-15.90%
Building Official	5.34%	4.68%	4.28%
Captain	9.88%	13.43%	15.48%
Chief Deputy Cor	-22.04%	-21.27%	-20.79%
Principal Deputy Court Clerk	-7.31%	-7.10%	-6.97%
Comb Commercial Inspector I	6.67%	7.40%	7.86%
Comb Residential Inspector I	-0.29%	0.44%	0.90%
Communications Officer	3.56%	2.28%	1.48%
Communications Supervisor	9.97%	6.55%	4.46%
Economic Development Coordinator	-	-	-
Construction Superintendent	-	-	-
Convenience Cntr Attendant I	-13.81%	-13.16%	-12.74%
County Attorney	-	-	-
Customer Service Center Manager	-	-	-
Custodian	-	-	-
Customer Service Specialist	1.54%	1.56%	1.58%
Deputy Clerk I	1.33%	1.68%	1.90%
Deputy Clerk li	-	-	-
Deputy Commonwealth Attorney	-4.64%	-11.35%	-15.31%
Deputy County Administrator	13.46%	9.37%	6.89%
Averages	-1.87%	-2.52%	-2.90%

*This table provides the average minimums, midpoints, and maximums from the client's peers as a percentage comparison to the client's current ranges.

Exhibit A.3: Number of Respondents

Number of Respondents from the Market Survey

Classification	Number of Respondents
Animal Protection Officer	5
Accounting Analyst	6
Administrative Assistant	6
Animal Shelter Attendant	5
Battalion Chief	4
Building Official	5
Captain	5
Chief Deputy Cor	4
Principal Deputy Court Clerk	4
Comb Commercial Inspector I	6
Comb Residential Inspector I	6
Communications Officer	6
Communications Supervisor	5
Economic Development Coordinator	2
Construction Superintendent	3
Convenience Cntr Attendant I	4
County Attorney	1
Customer Service Center Manager	3
Custodian	5
Customer Service Specialist	5
Deputy Clerk I	5
Deputy Clerk li	3
Deputy Commonwealth Attorney	4
Deputy County Administrator	4

*The Number of Respondents tables breaks down the number of data point per surveyed classification.

Exhibit A.4: Proposed Pay Plan General Employees

General Pay Plan

Adjustment Option: 0%

Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum	Range Spread	Grade Progression
101	\$29,000.00	\$39,875.00	\$50,750.00	75.00%	-
102	\$30,522.50	\$41,328.63	\$52,134.75	75.00%	5.25%
103	\$32,277.54	\$43,705.02	\$55,132.50	75.00%	5.75%
104	\$34,133.50	\$46,218.06	\$58,302.62	75.00%	5.75%
105	\$36,096.18	\$48,875.60	\$61,655.02	75.00%	5.75%
106	\$38,171.71	\$51,685.94	\$65,200.18	75.00%	5.75%
107	\$40,366.58	\$54,657.89	\$68,949.19	75.00%	5.75%
108	\$42,687.66	\$57,800.72	\$72,913.77	75.00%	5.75%
109	\$45,142.20	\$61,124.26	\$77,106.31	75.00%	5.75%
110	\$47,737.88	\$64,638.90	\$81,539.92	75.00%	5.75%
111	\$50,482.81	\$68,355.64	\$86,228.47	75.00%	5.75%
112	\$53,385.57	\$72,286.09	\$91,186.61	75.00%	5.75%
113	\$56,455.24	\$76,442.54	\$96,429.84	75.00%	5.75%
114	\$59,701.41	\$80,837.98	\$101,974.55	75.00%	5.75%
115	\$63,134.24	\$85,486.17	\$107,838.09	75.00%	5.75%
116	\$66,764.46	\$90,401.62	\$114,038.78	75.00%	5.75%
117	\$70,603.42	\$95,599.71	\$120,596.01	75.00%	5.75%
118	\$74,663.12	\$101,096.70	\$127,530.28	75.00%	5.75%
119	\$78,956.25	\$106,909.76	\$134,863.27	75.00%	5.75%
120	\$83,496.23	\$113,057.07	\$142,617.91	75.00%	5.75%
121	\$88,297.26	\$119,557.85	\$150,818.44	75.00%	5.75%
122	\$93,374.36	\$126,432.43	\$159,490.50	75.00%	5.75%
123	\$98,743.38	\$133,702.29	\$168,661.20	75.00%	5.75%
124	\$104,421.13	\$141,390.17	\$178,359.22	75.00%	5.75%
125	\$110,425.34	\$149,520.11	\$188,614.88	75.00%	5.75%
126	\$116,774.80	\$158,117.52	\$199,460.23	75.00%	5.75%
127	\$123,489.35	\$167,209.27	\$210,929.20	75.00%	5.75%

*The Proposed Pay Plan tables in Exhibit A.4 - A.6 provide an illustration of how AutoSolve presents to the client the new proposed pay plans.

Exhibit A.5: New Proposed Pay plan: Safety Employees

Public Safety Plan

Adjustment Option: 0%

Grade	Proposed Minimum	Proposed Midpoint	Proposed Maximum	Range Spread	Grade Progression	Step Progression
200	\$31,200.00	\$42,120.00	\$53,040.00	70.00%	-	2.24%
201	\$32,916.00	\$44,436.60	\$55,957.20	70.00%	5.50%	2.24%
202	\$34,726.38	\$46,880.61	\$59,034.85	70.00%	5.50%	2.24%
203	\$36,636.33	\$49,459.05	\$62,281.76	70.00%	5.50%	2.24%
204	\$38,651.33	\$52,179.29	\$65,707.26	70.00%	5.50%	2.24%
205	\$40,777.15	\$55,049.16	\$69,321.16	70.00%	5.50%	2.24%
206	\$43,019.90	\$58,076.86	\$73,133.82	70.00%	5.50%	2.24%
207	\$45,385.99	\$61,271.09	\$77,156.18	70.00%	5.50%	2.24%
208	\$48,789.94	\$65,866.42	\$82,942.90	70.00%	7.50%	2.24%
209	\$52,449.18	\$70,806.40	\$89,163.61	70.00%	7.50%	2.24%
210	\$56,382.87	\$78,936.02	\$101,489.17	80.00%	7.50%	2.48%
211	\$60,611.59	\$84,856.22	\$109,100.86	80.00%	7.50%	2.48%
212	\$65,157.46	\$91,220.44	\$117,283.42	80.00%	7.50%	2.48%
213	\$70,044.27	\$98,061.97	\$126,079.68	80.00%	7.50%	2.48%
214	\$75,297.59	\$105,416.62	\$135,535.66	80.00%	7.50%	2.48%
215	\$80,944.91	\$113,322.87	\$145,700.83	80.00%	7.50%	2.48%
216	\$84,587.43	\$118,422.40	\$152,257.37	80.00%	4.50%	2.48%
217	\$88,393.86	\$123,751.41	\$159,108.95	80.00%	4.50%	2.48%
218	\$92,371.59	\$129,320.22	\$166,268.85	80.00%	4.50%	2.48%
219	\$96,528.31	\$135,139.63	\$173,750.95	80.00%	4.50%	2.48%
220	\$100,872.08	\$141,220.91	\$181,569.74	80.00%	4.50%	2.48%

Exhibit A.6: Step Plan

Grades	1	2	3	4	5	6	7
200	\$31,200.00	\$31,897.50	\$32,610.59	\$33,339.62	\$34,084.96	\$34,846.95	\$35,625.98
201	\$32,916.00	\$33,651.86	\$34,404.17	\$35,173.30	\$35,959.63	\$36,763.53	\$37,585.41
202	\$34,726.38	\$35,502.71	\$36,296.40	\$37,107.84	\$37,937.41	\$38,785.53	\$39,652.61
203	\$36,636.33	\$37,455.36	\$38,292.71	\$39,148.77	\$40,023.97	\$40,918.73	\$41,833.50
204	\$38,651.33	\$39,515.41	\$40,398.80	\$41,301.95	\$42,225.28	\$43,169.26	\$44,134.34
205	\$40,777.15	\$41,688.76	\$42,620.74	\$43,573.56	\$44,547.68	\$45,543.57	\$46,561.73
206	\$43,019.90	\$43,981.64	\$44,964.88	\$45,970.10	\$46,997.80	\$48,048.47	\$49,122.63
207	\$45,385.99	\$46,400.63	\$47,437.95	\$48,498.46	\$49,582.68	\$50,691.13	\$51,824.37
208	\$48,789.94	\$49,880.67	\$50,995.79	\$52,135.84	\$53,301.38	\$54,492.97	\$55,711.20
209	\$52,449.18	\$53,621.72	\$54,820.48	\$56,046.03	\$57,298.98	\$58,579.94	\$59,889.54
210	\$56,382.87	\$57,780.80	\$59,213.39	\$60,681.49	\$62,186.00	\$63,727.81	\$65,307.84
211	\$60,611.59	\$62,114.36	\$63,654.39	\$65,232.61	\$66,849.95	\$68,507.39	\$70,205.93
212	\$65,157.46	\$66,772.94	\$68,428.47	\$70,125.05	\$71,863.70	\$73,645.45	\$75,471.37
213	\$70,044.27	\$71,780.91	\$73,560.61	\$75,384.43	\$77,253.47	\$79,168.86	\$81,131.73
214	\$75,297.59	\$77,164.48	\$79,077.65	\$81,038.26	\$83,047.48	\$85,106.52	\$87,216.61
215	\$80,944.91	\$82,951.81	\$85,008.48	\$87,116.13	\$89,276.05	\$91,489.51	\$93,757.85
216	\$84,587.43	\$86,684.64	\$88,833.86	\$91,036.36	\$93,293.47	\$95,606.54	\$97,976.96
217	\$88,393.86	\$90,585.45	\$92,831.38	\$95,132.99	\$97,491.67	\$99,908.83	\$102,385.92
218	\$92,371.59	\$94,661.80	\$97,008.79	\$99,413.98	\$101,878.80	\$104,404.73	\$106,993.29
219	\$96,528.31	\$98,921.58	\$101,374.19	\$103,887.61	\$106,463.34	\$109,102.94	\$111,807.98
220	\$100,872.08	\$103,373.05	\$105,936.03	\$108,562.55	\$111,254.19	\$114,012.57	\$116,839.34

Exhibit A.7: Implementation Options

Implementation Cost Options

Implementation Options	General Pay Plan	Public Safety Plan	Total Implementation Cost
Bring to New Minimum	\$149,773.80	\$84,438.25	\$234,212.05
Class Year Parity	\$456,888.00	\$426,682.00	\$883,570.00
Hire Year Parity	\$675,162.60	\$393,931.89	\$1,069,094.49
Current Range Penetration	\$569,231.10	\$215,186.12	\$784,417.23
Current Range Penetration Capped at 10%	\$516,833.33	\$199,483.15	\$716,316.48
Hybrid Year	\$421,999.00	\$367,932.00	\$789,931.00
Compa Ratio	\$643,258.06	\$278,905.47	\$922,163.53

Number of Employees Adjusted Per Option

Implementation Options	General Pay Plan	Public Safety Plan	Total Number of Employee Adjustments
Bring to New Minimum	63	83	146
Class Year Parity	120	140	260
Hire Year Parity	117	142	259
Current Range Penetration	124	111	235
Current Range Penetration Capped at 10%	150	132	282
Hybrid Year	154	151	305
Compa Ratio	111	109	220

Average Salary and Percentage Adjustment

Implementation Options	General Pay Plan		Public Safety Plan	
	Average Salary Adjustment	Average Percentage Adjustment	Average Salary Adjustment	Average Percentage Adjustment
Bring to New Minimum	\$2,377.36	9.17%	\$703.45	1.34%
Class Year Parity	\$3,054.00	7.34%	\$2,600.00	5.32%
Hire Year Parity	\$4,870.98	9.21%	\$3,236.73	4.45%
Current Range Penetration	\$3,872.32	11.40%	\$1,863.82	2.84%
Current Range Penetration Capped at 10%	\$3,515.87	8.30%	\$1,625.11	2.60%
Hybrid Year	\$4,045.65	3.40%	\$2,245.11	3.67%
Compa Ratio	\$3,563.16	9.78%	\$869.14	1.49%

*Exhibit A.7 Provides an illustration of how AutoSolve presents the difference in provide implementation options.

Exhibit A.8: Paygrade Assignment Table

Grade	Classification	Min	Max
200	Court Security Specialist	\$31,200.00	\$53,040.00
201	Communications Officer	\$32,916.00	\$55,957.20
202	-	\$34,726.38	\$59,034.85
203	Crime Analyst	\$36,636.33	\$62,281.76
204	Fire Logistics Officer Training And Safety Officer	\$38,651.33	\$65,707.26
205	Court Deputy Deputy Firefighter/EMS ALS Firefighter/EMS BLS Firefighter/EMS Paramedic Investigator	\$40,777.15	\$69,321.16
206	-	\$40,777.15	\$69,321.16

*Exhibit A.8 provides an illustration of how AutoSolve presents the new grades for each of the client's classifications.

Exhibit A.9: Employee Compensation Management System

Public Employees

											Option: <input type="radio"/> Closest Step		
Last Name	First Name	Employee ID	Hire Year	Class Year	Classification	Grade	Step	Min	Mid	Max	Low Annual Salary	Past Salary	Cost to Implement
Emp. Last Name Here	Emp. First Name Here	7043	11/17/08	11/17/08	COMMUNICATIONS OFFICER	201	5	\$32,916.00	\$44,436.60	\$55,957.20	\$44,099.98	\$44,857.55	\$757.57
Emp. Last Name Here	Emp. First Name Here	7327	10/28/15	10/28/15	COMMUNICATIONS OFFICER	201	9	\$32,916.00	\$44,436.60	\$55,957.20	\$48,369.27	\$49,005.38	\$636.11
Emp. Last Name Here	Emp. First Name Here	9575	3/12/18	3/12/18	COMMUNICATIONS OFFICER	201	6	\$32,916.00	\$44,436.60	\$55,957.20	\$45,579.42	\$45,860.98	\$280.95
Emp. Last Name Here	Emp. First Name Here	4209	2/4/08	2/4/08	COMMUNICATIONS OFFICER	201	13	\$32,916.00	\$44,436.60	\$55,957.20	\$53,224.52	\$53,536.74	\$312.22
Emp. Last Name Here	Emp. First Name Here	4518	9/22/03	9/22/03	COMMUNICATIONS OFFICER	201	14	\$32,916.00	\$44,436.60	\$55,957.20	\$53,971.01	\$54,733.59	\$762.58
Emp. Last Name Here	Emp. First Name Here	3249	3/5/18	3/5/18	COMMUNICATIONS OFFICER	201	6	\$32,916.00	\$44,436.60	\$55,957.20	\$45,579.42	\$45,860.98	\$280.95
Emp. Last Name Here	Emp. First Name Here	8684	12/10/07	12/10/07	COMMUNICATIONS OFFICER	201	13	\$32,916.00	\$44,436.60	\$55,957.20	\$53,224.52	\$53,536.74	\$312.22
Emp. Last Name Here	Emp. First Name Here	6548	9/17/07	9/17/07	COMMUNICATIONS OFFICER	201	13	\$32,916.00	\$44,436.60	\$55,957.20	\$53,224.52	\$53,536.74	\$312.22
Emp. Last Name Here	Emp. First Name Here	3581	10/1/07	10/1/07	COMMUNICATIONS OFFICER	201	13	\$32,916.00	\$44,436.60	\$55,957.20	\$53,224.52	\$53,536.74	\$312.22
Emp. Last Name Here	Emp. First Name Here	6474	8/28/17	8/28/17	COMMUNICATIONS OFFICER	201	7	\$32,916.00	\$44,436.60	\$55,957.20	\$46,490.81	\$46,885.62	\$394.81
Emp. Last Name Here	Emp. First Name Here	7681	10/13/20	10/13/20	COMMUNICATIONS OFFICER	201	5	\$32,916.00	\$44,436.60	\$55,957.20	\$44,252.21	\$44,857.55	\$605.35
Emp. Last Name Here	Emp. First Name Here	4249	12/28/20	12/28/20	COMMUNICATIONS OFFICER	201	5	\$32,916.00	\$44,436.60	\$55,957.20	\$44,252.21	\$44,857.55	\$605.35
Emp. Last Name Here	Emp. First Name Here	2146	9/21/21	9/21/21	COMMUNICATIONS OFFICER	201	5	\$32,916.00	\$44,436.60	\$55,957.20	\$44,099.98	\$44,857.55	\$757.57
Emp. Last Name Here	Emp. First Name Here	7349	12/9/21	12/9/21	COMMUNICATIONS OFFICER	201	4	\$32,916.00	\$44,436.60	\$55,957.20	\$42,962.77	\$43,876.66	\$913.88
Emp. Last Name Here	Emp. First Name Here	8464	5/4/98	5/4/98	COMMUNICATIONS SUPERVISOR	207	8	\$45,385.99	\$61,271.09	\$77,156.18	\$65,277.36	\$66,093.15	\$815.79
Emp. Last Name Here	Emp. First Name Here	4005	2/3/14	2/3/14	BATTALION CHIEF	213	8	\$70,044.27	\$98,061.97	\$126,079.68	\$90,304.22	\$91,544.31	\$1,240.09
Emp. Last Name Here	Emp. First Name Here	8458	2/3/20	2/3/20	DEPUTY FIRE CHIEF	218	8	\$92,371.59	\$129,320.22	\$166,268.85	\$117,713.55	\$118,085.11	\$371.56
Emp. Last Name Here	Emp. First Name Here	4408	11/8/07	11/8/07	FIRE CAPTAIN	211	11	\$60,611.59	\$84,856.22	\$109,100.86	\$84,829.83	\$86,541.14	\$1,711.31
Emp. Last Name Here	Emp. First Name Here	4766	3/23/09	3/23/09	FIRE CAPTAIN	211	13	\$60,611.59	\$84,856.22	\$109,100.86	\$89,379.28	\$90,453.77	\$1,074.49
Emp. Last Name Here	Emp. First Name Here	4101	6/17/13	6/17/13	FIRE CAPTAIN	211	10	\$60,611.59	\$84,856.22	\$109,100.86	\$83,394.98	\$84,648.75	\$1,253.77
Emp. Last Name Here	Emp. First Name Here	6772	6/28/04	6/28/04	FIRE CHIEF	220	8	\$100,872.08	\$141,220.91	\$181,569.74	\$133,079.03	\$134,781.97	\$1,702.94
Emp. Last Name Here	Emp. First Name Here	8693	7/2/09	7/2/09	FIRE LOGISTICS OFFICER	204	14	\$36,651.33	\$52,179.29	\$65,707.26	\$63,789.96	\$64,270.45	\$490.49
Emp. Last Name Here	Emp. First Name Here	4894	8/1/12	8/1/12	FIRE MARSHAL	211	17	\$60,611.59	\$84,856.22	\$109,100.86	\$98,100.50	\$98,817.72	\$717.22
Emp. Last Name Here	Emp. First Name Here	9755	8/16/19	8/16/19	FIREFIGHTER/EMS ALS	205	8	\$40,777.15	\$55,049.16	\$69,321.16	\$56,861.04	\$59,381.55	\$2,520.52
Emp. Last Name Here	Emp. First Name Here	4070	6/17/13	6/17/13	FIREFIGHTER/EMS BLS	205	7	\$40,777.15	\$55,049.16	\$69,321.16	\$58,744.87	\$59,381.55	\$636.69
Emp. Last Name Here	Emp. First Name Here	3990	8/16/19	8/16/19	FIREFIGHTER/EMS BLS	205	4	\$40,777.15	\$55,049.16	\$69,321.16	\$54,657.94	\$55,570.64	\$912.71
Emp. Last Name Here	Emp. First Name Here	4347	2/23/15	2/23/15	FIREFIGHTER/EMS BLS	205	7	\$40,777.15	\$55,049.16	\$69,321.16	\$57,765.57	\$58,083.06	\$317.49

*Exhibit A.9 provides an illustration of how AutoSolve presents the created Compensation Management System.

Exhibit A.10: Implementation Option Descriptions

Implementation Options	Description
Bring to New Minimum/Closest Step	Each employee's salary is adjusted to the minimum of the new proposed pay grade per their classification. If their current salary is already within the new proposed pay grade range, little to no adjustment is made.
Class Year Parity	Class year parity aims to align an employee's salary within their recommended new paygrade range based on how long they have worked in their current classification. This is calculated on 30-year career basis, where an employee with 15 years of experience in one classification is placed at the midpoint of their new paygrade range.
Hire Year Parity	Hire year parity aims to align an employee's salary within their recommended new paygrade range based on their overall tenure with the organization. This is calculated on 30-year career basis, where an employee with 15 years of experience with the organization is placed at the midpoint of their new paygrade range.
Current Range Penetration	Current range penetration utilizes the employee's current penetration within their current paygrade range and applies it to their new proposed paygrade. For example, if an individual is 25% through their current paygrade range, they are brought to 25% percent of their recommended paygrade range.
Current Range Penetration Capped at 10%	Current range penetration capped at 10% utilizes the employee's current penetration within their current paygrade range and applies it to their new proposed paygrade or no more than 10% of their current salary. (The capped percentages an adjustable number that can be changed based on client desire and need.)
Step to Step	Step to step calculates the cost of keeping each employee on their current step within the new proposed plan.
Step Plus One	Step plus one calculates the cost of moving each employee up one step from their current step using the new proposed plan.
Hybrid Year	Hybrid year places employees into their newly recommended paygrade ranges based on a hybrid between class year parity and hire year parity.
Compensation Ratio	Compensation Ratio is a calculation that evaluate an employer's current ratio to their grade midpoint. The ratio places employees into a new recommended pay grade range at the same ratio vs. the midpoint. For example, employees who are at their current paygrade range quarter mark are now at (50% compa ratio) would be place at their new recommended salary at 25% range penetration.

Exhibit B – City of Madeira Beach Attachment

COMPLIANCE WITH ALL APPLICABLE LAWS

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by **Jeff Turner President**

For **AutoSolve, Inc.**

whose business address is: **313 S Forest Dune Drive, Saint Augustine, FL 32080** and (if applicable) its Federal Employer Identification Number (FEIN) is **59-3212545** (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
 - (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
 - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
 - (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the

City of Madeira Beach
RFP 24-01

statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).

(3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:

- (i) abide by the terms of the statement; and
- (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.

(4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.

(5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.

(6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity

City of Madeira Beach
RFP 24-01

or the individual.

Signature: *Jeff Turner*
Title: **President**
Company: **AutoSolve, Inc**

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF St Augustine, St Johns

Sworn to and subscribed before me this 5 day of February, 2024.

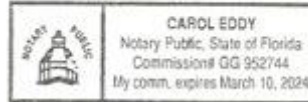
by Jeff Turner who

is personally known to me OR Produced identification

FLDL [type of

identification] My commission expires 03/10/2024

Notary Public Signature Carol Eddy
[Print, type or stamp Commissioned name of Notary Public]



Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent

Title

Jeff Turner

President

Printed Name


Date

Jeff Turner

2/5/2024

City of Madeira Beach
RFP 24-01

Exhibit C – Insurance Certificate

		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 07/14/2023					
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p>									
<p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>									
PRODUCER NUTMEG INS AGENCY INC/PHS 76210781 The Hartford Business Service Center 3600 Wiseman Blvd San Antonio, TX 78251			CONTACT NAME: PHONE (888) 925-3137 (A/C, No, Ext): FAX (A/C, No): E-MAIL ADDRESS:		INSURER(S) AFFORDING COVERAGE NAIC#				
INSURED AutoSolve, Inc. 313 S FOREST DUNE DR SAINT AUGUSTINE FL 32080			INSURER A : Hartford Underwriters Insurance Company 30104 INSURER B : Hartford Casualty Insurance Company 29424 INSURER C : INSURER D : INSURER E : INSURER F :						
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:					
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>									
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> General Liability			76 SBU AY1PWB	05/26/2023	05/26/2024	<input type="checkbox"/> EACH OCCURRENCE \$2,000,000 <input type="checkbox"/> DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 <input type="checkbox"/> MED EXP (Any one person) \$10,000 <input type="checkbox"/> PERSONAL & ADV INJURY \$2,000,000 <input type="checkbox"/> GENERAL AGGREGATE \$4,000,000 <input type="checkbox"/> PRODUCTS - COMP/OP AGG \$4,000,000		
GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:									
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			76 SBU AY1PWB	05/26/2023	05/26/2024	<input type="checkbox"/> COMBINED SINGLE LIMIT (Ea accident) \$2,000,000 <input type="checkbox"/> BODILY INJURY (Per person) <input type="checkbox"/> BODILY INJURY (Per accident) <input type="checkbox"/> PROPERTY DAMAGE (Per accident)		
	<input type="checkbox"/> UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR CLAIMS-MADE <input type="checkbox"/> DED RETENTION \$							<input type="checkbox"/> EACH OCCURRENCE <input type="checkbox"/> AGGREGATE	
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY <input type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	76 WEG AY7FA3	07/13/2023	07/13/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER	<input type="checkbox"/> E.L. EACH ACCIDENT \$100,000 <input type="checkbox"/> E.L. DISEASE - EA EMPLOYEE \$100,000 <input type="checkbox"/> E.L. DISEASE - POLICY LIMIT \$500,000	
A	Professional Liability			76 SBU AY1PWB	05/26/2023	05/26/2024	<input type="checkbox"/> Each Claim Limit \$1,000,000 <input type="checkbox"/> Aggregate Limit \$1,000,000		
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) Those usual to the Insured's Operations.									
CERTIFICATE HOLDER For Informational Purposes 313 S FOREST DUNE DR SAINT AUGUSTINE FL 32080				CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Susan S. Castaneda</i>					

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ACORD 25 (2016/03)

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Exhibit D – Reference Letter - Ms. Hannah Metevia - GrowFL



July 28, 2023

To Whom It May Concern,

I am pleased to write this letter of recommendation for Mr. Jeff Turner, whose exceptional contributions and expertise have significantly impacted the success of our organization's programs and initiatives.

Throughout his tenure with us, Jeff has been instrumental in various capacities. As a strategy consultant, he played a pivotal role in the growth and success of our System for Integrated Growth program, a highly valuable initiative aimed at assisting CEOs in addressing internal and external challenges. Jeff's active involvement in over 350 strategic engagements with CEOs not only impacted their top line revenue but contributed significantly to the program's enduring growth and success.

Moreover, we utilize Jeff's expertise to conduct two rounds of in-depth due diligence for our annual awards program, GrowFL Florida Companies to Watch. His proficiency and extensive knowledge of the business landscape make him an invaluable asset in this critical capacity. Unlike similar organizations to GrowFL that frequently rotate their due-diligence providers, Jeff's unwavering experience and dedication have made him the sole individual we trust to handle this crucial responsibility year after year.

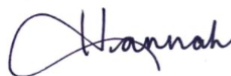
No matter the project, Jeff's meticulousness, analytical skills, and risk assessment and mitigation abilities have consistently delivered outstanding results. His keen eye for detail ensures thorough and accurate evaluations, providing us with valuable insights and recommendations for informed decision-making. Throughout our collaborations with Jeff, he has consistently met deadlines, displaying flexibility a commitment in accommodating our needs.

We are continually impressed with Jeff's professionalism, leadership, and dedication to our organization's goals. His diligent work and his exceptional support have contributed significantly to the success of our annual awards program and the System for Integrated Growth program for well over a decade.

We are privileged to have worked with Jeff, and without reservation, will contract with Jeff again, knowing that our programs would be in the most capable hands.

I wholeheartedly recommend Jeff Turner for any venture or project requiring a skilled, knowledgeable, and dedicated individual.

Sincerely,



Hannah Metevia
Engagement Manager
Email: Hannah@GrowFL.com Phone 989-293-4354

Bolton

Benefits, Actuarial, Investment & Compensation Consulting

RFP #2024-01 HR, Classification, and Compensation Plans Study

Proposed Consulting Services

February 8, 2024

For Bolton:
Dan Ripberger
Managing Director, Practice Lead
3825 Edwards Rd, Suite 103
Cincinnati, OH 45209
(513) 290-1770
djripberger@boltonusa.com



City Of
Madeira Beach
FLORIDA
Dan Ripberger
Managing Director, Practice Lead
1200 Wilson Boulevard | Suite 810
Arlington, VA 22201
(202) 670-5820
djripberger@boltonusa.com

Table of Contents

Item 6B.

I. Introduction	1
II. About Bolton	2
III. Project Approach	5
IV. Planned Project Team	12
V. Timing and Fees	15
Appendix:	
Bolton Public Sector Clients	
Required Forms	

I. Introduction

Background

The City of Madeira Beach (Madeira Beach) is a city in Pinellas County, Florida, United States, bordered on the west by the Gulf of Mexico, and on the east by St. Petersburg. Madeira Beach, a Gulf Coast barrier island community, provides exceptional services to our residents, businesses, and visitors in a manner consistent with the eclectic nature of the city. The City of Madeira Beach is a commission-manager form of government. The Board of Commissioners (BOC) have legislative power of the city that includes adopting, amending, and repealing ordinances and resolutions, levying taxes, applying for and approving grants, renewing or extending franchises, and setting fees or user charges or municipal services. The BOC appoints the City Clerk, City Manager, City Attorney, and authorizes the City Manager to appoint the Finance Director/City Treasurer, and all serve at its pleasure. The City government provides services through approximately eight major departments.

Madeira Beach offers a full complement of total compensation programs designed to attract, retain and engage the type and caliber of staff required to provide services and meet the expectations of the community. Its human resources staff actively manage the total compensation program to ensure its alignment with City needs.

Madeira Beach is currently seeking proposals from qualified consultants to conduct a thorough and independent review of its classification and compensation program. As experts with specialized knowledge of public sector compensation systems in Florida and across the United States, Bolton was asked to submit this proposal describing our approach, planned team, and expected timing and fees to complete the desired study.

Objectives

The primary engagement objective is to review and, if needed, recommend changes to Madeira Beach's classification and compensation program. Based on our current understanding and expertise in organization development, classification, and compensation, meeting this objective will require the review of specific elements:

- Reward philosophy;
- Job documentation, descriptions, and evaluation;
- Market compensation benchmarking and analysis;
- Base pay structure(s) with grade and ranges;
- Job classification and grading; and
- Base pay delivery policies (market adjustments, merit adjustments, etc.).

II. About Bolton

Bolton Partners, Inc.

Bolton is a national full-service compensation, employee benefits, actuarial, and investment consulting firm with over 40 years of experience providing consulting services to clients in the public and corporate sectors, nonprofit organizations, as well as for the Federal Government. The firm was founded in 1981 by Mr. Robert G. Bolton, FSA, EA, MAAA, FCA, as an independent actuarial and employee benefits firm. Headquartered in Baltimore, Maryland, we also have offices in Colorado, New Jersey, Florida, Georgia, Ohio, Pennsylvania, and Virginia.

About Bolton Rewards

Bolton Rewards is the reward strategy and compensation consulting and services practice of Bolton. Our team of reward strategists, consultants and analysts provides services across a wide spectrum of total reward and compensation areas, including:

- Total Reward Strategy;
- Organization Performance and Design;
- Organizational communication;
- Classification and Compensation Programs;
- Performance Management; and
- Market Surveys and Research.

A Bit More on Selected Rewards Services

Organizational and Employee Performance

- We help agencies improve service delivery in a number of areas, including finance and purchasing, human resources, risk management, and records management.
- Our services include organizational assessments, staffing analysis, engagement surveys, performance management, compliance audits, process improvement, and strategic planning.

Top Executive Pay and Performance

- We provide board members and elected officials with a logical and straightforward path to making objective decisions and achieving results.

Pay Program Management Co-Sourcing

- Tailored to the needs of individual organizations, our services meet a variety of needs our clients encounter each year. We help with regular and ad hoc market benchmarking and competitive assessments, pay program management – structure adjustments and job evaluation/grading changes, and budget preparation.

Value Definition and Communication

- We help clients create, communicate and socialize their value proposition to current and potential employees so they can recruit top talent and build true engagement.
- Our reward strategy process identifies value-added factors, helps prioritize human resource investment, explains different components of the employment relationship, and helps align rewards and organization performance.

II. About Bolton

Bolton remains committed to helping our local and state government clients succeed for their communities. A full listing of our over 250 public sector clients is provided in the [Appendix](#). We also have a long history working with Florida clients across our practices.

- Broward County, FL
- Clay County Government, FL
- Clay County Sheriff's Office, FL
- City of Boca Raton, FL
- City of Cape Coral, FL
- City of Cocoa, FL
- City of Doral, FL
- City of Dunedin, FL
- City of Flagler Beach, FL
- City of Fort Myers Shores, FL
- City of Hallandale Beach, FL
- City of Hialeah Gardens, FL
- City of Hollywood, FL
- City of Lake Mary, FL
- City of Lakeland, FL
- City of Miami, FL
- City of Melbourne, FL
- City of PSL Gardens, FL
- City of Port St. Lucie, FL
- City of Miramar, FL
- City of New Smyrna Beach, FL
- City of North Fort Myers, FL
- City of Orlando, FL
- City of Palm Beach Gardens, FL
- City of Pompano Beach, FL
- City of Riviera Beach, FL
- City of Sanford, FL
- City of Sarasota, FL
- City of West Palm Beach, FL
- City of Winter Park, FL
- Emerald Coast Utilities, FL
- Fort Myers Shore Fire, FL
- Highlands County, FL
- Jacksonville, FL Transportation Authority
- Lake Worth, FL Drainage District
- Manatee County, FL
- Monroe County, FL
- North Fort Myers, FL Fire District
- Orange County Sheriff's Office, FL
- Palm Harbor, FL Fire Rescue
- Santa Rosa County, FL
- Town of Cutler Bay, FL
- Town of Davie, FL
- Town of Juno Beach, FL
- Village of Royal Palm Beach, FL
- Washington County, FL

Selected References

Client	Project
City of Dunedin, Florida Theresa Smalling Director, Human Resources & Risk Mgt (727) 298-3042 tsmalling@dunedinfl.net	Reviewed and redesigned Dunedin’s job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Maitland, Florida Liberty Gondar Director Human Resources (407) 539-6255 lgondar@itsmymaitland.com	Reviewed and redesigned Maitland’s job description, job evaluation, classification, and performance management plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Lakeland, Florida Mark Farrington Director Human Resources (863) 834-6866 mark.farrington@lakelandgov.net	Reviewed and redesigned Lakeland’s job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Winter Park, Florida Pam Russell Division Director, Human Resources (407) 559-3227 prussell@cityofwinterpark.org	Reviewed and redesigned Winter Park’s job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.

III. Project Approach – Preliminary Work Plan

Phase 1: Project Planning and Discovery

Step 1: Project Planning

- We will kick off the project with a meeting among the Madeira Beach and Bolton project teams to finalize engagement goals and scope and establish data needs, time milestones, and deliverables.
- Bolton will prepare data requests and assist with data collection, as needed, and will prepare a working project plan.

Step 2: Current Program Review

- Bolton will collect and internally review the organizational plan and policy documents, as well as previous assessments and analyses that describe the current compensation and benefits programs and their administration.
- We will meet with the HR team to ensure our full understanding of the current program.

Step 3: Communication Planning

- Should Madeira Beach desire assistance communicating the study within the organization, we will help develop a communication plan. Our communication plan will help define key messages, specific audiences, the best media to use, and appropriate timing and milestones.
- We will provide template memo text/talking points for employee communication and can conduct an electronic project briefing session that can be recorded for ongoing use. We also conduct on-site, in-person briefing sessions.

Step 4: Leadership Briefing

- Bolton will work to brief leadership - elected officials, executives, and department heads on the project and desired outcomes.
- We will also discuss the specific project steps, expected timing, and their role in helping the study succeed.

Step 5: Management Interviews

- We will interview department heads and other management to better understand the work, how it is organized, and intended job results, to learn more about special talent considerations and labor market challenges, and to gather perceptions of the current program's effectiveness.
- Prior to and in preparation for our interviews, we will work with Madeira Beach to request department heads complete our Departmental Functional Survey either online or via our tailored Microsoft Word form.

III. Project Approach – Preliminary Work Plan

Phase 2: Job Analysis and Evaluation

Step 1: Job Description Review

- We plan to work with Madeira Beach to collect existing job descriptions and review job content data (duties, responsibilities, and requirements) on all covered jobs.
- We will review both the format and the general language and text used within existing job descriptions. Our review will focus on several key areas:
 - Inconsistent use of compensable factor leveling terms;
 - Functions that are too task-based or are too numerous to be considered essential;
 - Overgeneralized job requirements; and
 - Inconsistency with PIFs, if PIFs are used.

Step 2: Job Title and System Review

- We also plan to review the use of job and position titles for internal consistency and market commonality.
- Typically, effective job titles have three components that are consistently applied:
 - Family or technical identification, such as Accounting, Construction, Equipment Maintenance, Planning, Recreation, or Water Treatment.
 - Name of the type of work completed, such as Analyst, Clerk, Coordinator, Manager, Engineer, Operator, Representative, Specialist, or Technician.
 - A designation for the level of work completed as part of a progression, if such a progression exists. The titles are sometimes indicated by numbers or letters or by specific labels, such as Associate, Entry, Staff, Senior, Principal, etc.

III. Project Approach – Preliminary Work Plan

Phase 2: Job Analysis and Evaluation (continued)

Step 3: Job Evaluation

- Job evaluation is a systematic approach to determining job value relative to other jobs for purposes of pay opportunity determination. Effective job evaluation systems:
 - Reflect organizational values;
 - Help rationalize and deliver internal equity;
 - Should be defined by legally-acceptable compensable factors – not competencies or performance-related behaviors; and
 - Align with the organization’s need to recruit and retain qualified staff.
- We will first organize jobs into our Career Stream families. A family is a group of jobs having the same nature of work but requiring different levels of skill, effort, responsibility, or working conditions. Families are the first grouping to establish progressions of skill, knowledge, and responsibility across jobs and are essential to ensuring organizational consistency and equity.
- Career Stream levels are clearly differentiated levels within a family. The levels for each family are defined in terms of a “whole job” approach (i.e., all job dimensions are evaluated in the aggregate rather than on an individual basis).
- Bolton will review the Madeira Beach’s current job evaluation system and job classification structure to assess its effectiveness in helping manage internal and external equity across the organization.

Step 5: FLSA and Other Legal Review

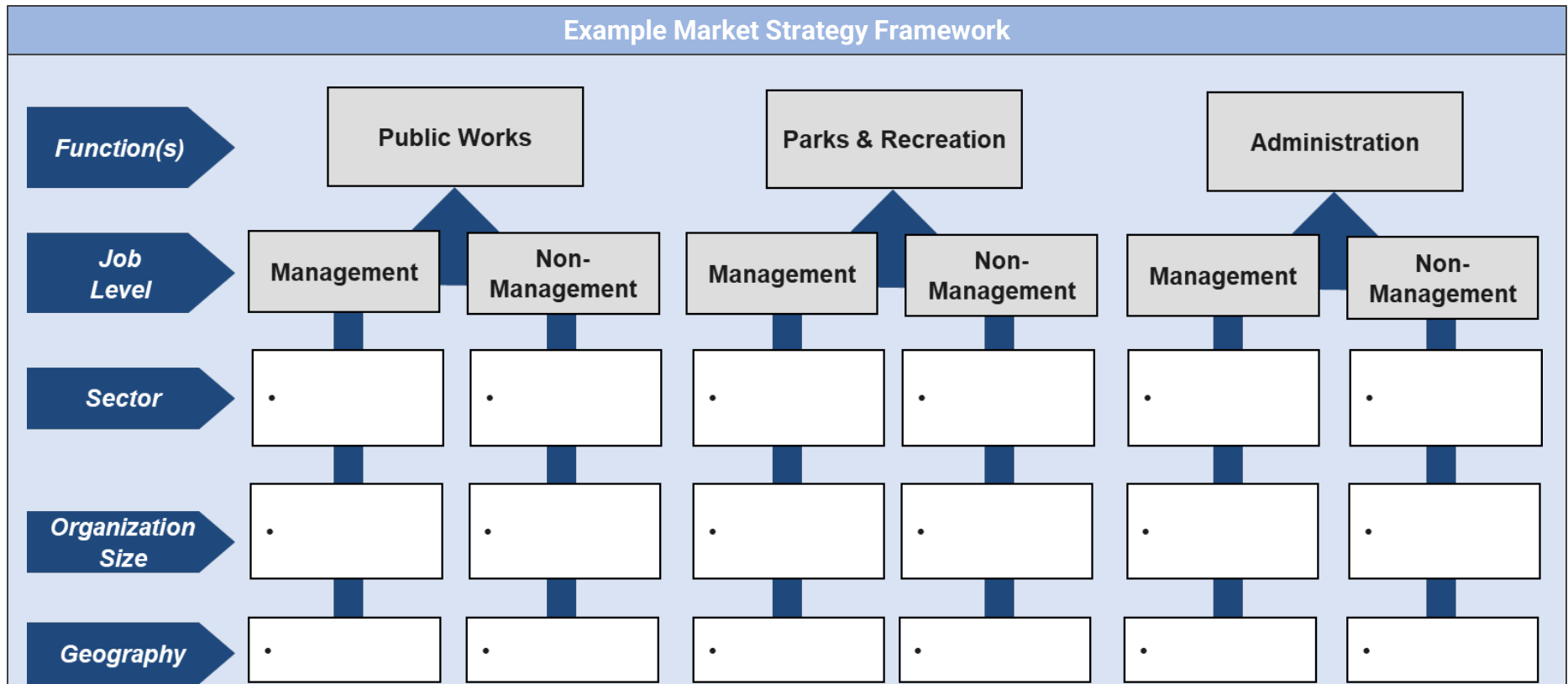
- Bolton will further review jobs to provide an opinion and guidance on classifications status with respect to the FLSA and EEO regulations.
- Specifically, we will apply Executive, Administrative, Professional, and or Computer exemption tests to determine exemption status on relevant jobs.
- In addition, we will assign jobs to one of the ten Employer Information Report EEO-1/4 Survey Categories.

III. Project Approach – Preliminary Work Plan

Phase 3: Market Benchmarking

Step 1: Market Strategy

- Collaborate with the Madeira Beach to finalize the competitive labor market(s) that aligns with the feedback received from leadership and management, including specific peer organizations.
- The market strategy will identify sectors – public sector employers as well as private sector employers – with whom Madeira Beach wants to compete for talent.
- It will also identify competitive differences based on the size of employers and their geographic location.



III. Project Approach – Preliminary Work Plan

Phase 3: Market Benchmarking (continued)

Step 2: Custom Survey/Original Research

- Using our TRDx platform, we will conduct a custom survey of total compensation levels and practices survey of identified peers.
- Guided by Madeira Beach’s market strategy, we anticipate researching cities and counties in the region as well as private employers, if appropriate.
- We will help define the most appropriate contacts at each peer and a communication plan designed to gain maximum participation.
- The custom survey will require the completion of several distinct tasks:
 - Identify benchmark job titles and descriptions for inclusion in a survey;
 - Prepare survey package for review and approval;
 - Make initial contact with potential participants to generate interest;
 - Electronically distribute the questionnaire to the invitee list and monitor survey returns and follow-up;
 - Collect and review returned surveys, following up with questions or verification of reported data;
 - Aggregate and summarize reported data for use in our analyses; and
 - Produce and distribute a summary report for participants.

Step 3: Published Survey Analysis

- In addition, Bolton maintains an extensive library of published surveys and research that covers a wide array of market sectors, geographies, and job types. Our CompManager database has over 500,000 records of base and total cash compensation data.
- We will incorporate these data into our analyses, if needed, to represent desired labor markets.
- The results of our survey and supplemental market research will be summarized and presented as part of our subsequent gap analysis.

III. Project Approach – Preliminary Work Plan

Phase 4: Program Review Recommendations

Step 1: Gap Analysis

- After our analysis of background data, the strategy discussions with senior leadership, and interviews with department heads, Bolton will assess if/where gaps may exist between the Madeira Beach’s objectives and the design and/or administration of its compensation system.
- Bolton will develop a series of conceptual recommendations to discuss and develop an overarching approach to subsequent work steps as well as the program design backdrop.
- After discussion with the Madeira Beach team, we will then finalize our review findings and recommendations.

Step 2: Job Title and Documentation Recommendations

- We will provide our recommendations resulting from our job analysis to include system tools and job-by-job editorial comments.
- During this step, Bolton will recommend changes to the job description and other document formats as well as develop a job title system.
- We will provide our recommended edits to existing jobs, recommend new jobs to be created, and recommend job title revisions if needed.
- Job descriptions are finalized once all classification and compensation plan components are finalized approved so necessary elements can be included on the job descriptions.

Step 3: Structure and Classification Plan

- Bolton will employ the market data to develop base pay structures and ranges which are market competitive and aligned with Madeira Beach’s compensation philosophy and objectives.
- We will integrate the job evaluation results with the market data to develop and implement a job classification system that aligns internal equity with market competitiveness.
- Our recommendations will include guidelines for future structure adjustments and how the adjustments impact employee pay.
- These guidelines will allow Madeira Beach to maintain its structures in a competitive position relative to the market over time.

III. Project Approach – Preliminary Work Plan

Phase 4: Program Review Recommendations (continued)

Step 4: Employee Pay Equity and Delivery Analysis

- Once the revised structure(s) is/are in place and jobs have been classified and assigned to grades, Bolton will assess the competitiveness and equity of actual employee pay.
- We will use compa-ratios, range penetration, or other market alignment measures to assess the overall competitive alignment of employees' actual pay.
- Working with Madeira Beach, we will also address wherein the pay range an employee should be paid relative to their performance over time in their specific job so that we can assess actual pay competitiveness and broader statistical trends or issues, such as career pay and pay compression.

Step 5: Base Pay Increase/Total Pay Delivery Plan

- Total pay plan design/policy recommendations that align how employee pay gets changed over time with what the organization values. Typical adjustments include merit increases or promotional increases and we will expand our recommendations to include:
 - Premium pay policies (e.g., Acting Pay; Extra Duty Pay; Shift Differential, etc.);
 - Position Changes - Reclassification Increase;
 - New hiring rates and salary offer guidelines;
 - Promotions (percentages and timing of pay changes); and
 - Demotions and voluntary reassignments.

Phase 5: Reporting and Implementation

Step 1: Draft Reporting, Costing and Planning

- We will prepare a comprehensive draft report of our methodology, review findings, and recommendations for discussion with Madeira Beach Administration and Human Resources.
- We will work with Madeira Beach to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.

Step 2: Final Reporting, Approval, and Policy Updates

- Based on discussions with Madeira Beach, we will incorporate agreed-upon changes and prepare a final report targeted for public disclosure.
- Should it be desired by the Madeira Beach, Bolton will present the study report or a summarized version to leadership and/or elected officials.

Step 3: Implementation and Communication

- We will also work with Madeira Beach to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.
- Major tasks we expect to complete include reviewing, editing, and finalizing policies; developing an implementation and communication plan for Madeira Beach use; working with HR to orient managers to the new systems; and transferring tools and resources to HR and provide training on their ongoing use.

IV. Planned Project Team

Dan Ripberger, Engagement Manager

With 30 years of experience, Dan has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Dan is particularly adept in:

- Change management counsel and direction – Dan is an astute advisor regarding the change management implications of organization-wide compensation projects and helps clients predict and prepare for the financial and employee relations effects of process decisions and plan change decisions.
- Integrating total rewards – an early contributor to the concept of total rewards, Dan helps clients rationalize the value of their total compensation programs (health benefits, paid time off, retirement, etc.) to help guide the design of pay programs and communicate the value proposition to employees and managers.
- Securing the support of elected and employee leadership – by demonstrating an understanding of the viewpoints of various stakeholders, Dan effectively communicates the purpose of plan changes and the benefit of changes to the organization.

Over his career, Dan has advised clients of most types and sizes and has developed specialized knowledge of the mission-focused and public sector markets. A sample of his public sector client assignments includes Ada OK, Albany GA, Baltimore County MD, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Laramie WY, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, University of North Carolina, US DoD Research and Engineering Labs, Wicomico County MD, Winter Park FL, and Wytheville VA. In addition, Dan has worked with such quasi-public sector organizations as DC Water & Sewer Authority, Municipal Securities Rulemaking Board, National Quality Forum, and Regional Income Tax Agency.

Dan began his consulting career with Towers Perrin and Aon/Radford Associates. He went on to help found PRM Consulting and managed the consulting practices for MPI Consulting. Dan joined Bolton as a result of their acquisition of RSC Advisory Group, a niche compensation and total rewards consulting he helped found in Washington, D.C., and the Midwest.

He earned a bachelor's degree with concentrations in Economics and Human Resources from Xavier University. He maintains professional certifications from both WorldatWork and the Society for Human Resource Management.

IV. Planned Project Team

Scott Schreiber

With 30 years of experience, Scott Schreiber has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Scott specializes in:

- Job Evaluation systems across a wide variety of organizations.
- Developing alternative approaches to Classification Systems, Point Factor plans, Scored Questionnaires, as well as Market-Based Job Evaluation.
- Tailoring Bolton's point factor job evaluation system to each client's needs.

A sample of Scott's public sector client assignments include Cincinnati METRO, County of Indianapolis, Green Township OH, Kenton County Airport Board, Marion County IN, Northern Kentucky Health Department, Takoma Park MD, Wor Wic Community College.

Previously, Scott served as the Midwest Compensation Practice Leader for Watson Wyatt. Prior to that, Scott was a Principal and Practice Leader for William M. Mercer's Inc.'s Reward and Talent Management practice, President of a small industrial manufacturer, Senior Vice President of Human Resources of a large insurance company, and several other corporate and consulting roles. Scott earned an MBA from Xavier University and a Bachelor of Arts from the University of Cincinnati.

Jennifer Durham, Senior Consultant

Jennifer Durham is a seasoned professional with over 20 years of collective total rewards and human resources management experience.

Her most recent experience includes market pricing and analysis, job classification, job evaluation, custom surveys, and structure development. Jennifer is the lead administrator for Bolton's market surveys, such as our TRDx client-specific surveys.

A sample of Jennifer's public sector client assignments includes Ada OK, Albany GA, Baltimore County MD, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Laramie WY, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, University of North Carolina, US DoD Research and Engineering Labs, Wicomico County MD, Winter Park FL, and Wytheville VA.

Prior to joining Bolton, Jennifer was a senior analyst with RSC Advisory Group with a focus on market pricing and analysis, custom survey administration, and executive compensation. Prior to consulting, she served as Director, Human Resources for Sekisui XenoTech.

She has a Bachelor's degree in both Accounting and Marketing from Kansas State University and holds senior professional certification through HRCI (SPHR).

IV. Planned Project Team

Danny Finkelstein, Senior Consultant

Danny Finkelstein is a seasoned analyst and project manager who works effectively with managers, executives, and individual contributors to make effective, efficient, data-based decisions and recommendations for Bolton's clients.

Prior to his current role, Danny was an Associate within Mercer's Human Capital group and a Senior Consultant and Project Manager within ORC Worldwide's Global Compensation and General Consulting groups, as well as providing project support to ORC's SIRS survey participants. He has over a dozen years of compensation consulting experience.

Danny has partnered with a wide variety of client organizations to tackle all natures of compensation and benefit issues ranging from market analysis and job pricing to salary structure design and implementation and performance management. The sectors he has touched on include life sciences (pharmaceutical, medical device, biotechnology), colleges and universities, the digital/graphic design space, the oil and gas industry, the financial/insurance sector, the non-profit sector, and numerous government agencies. This broad and varied sector experience has created deep expertise in market data sources and effectively leveraging the best available data for each unique client.

Danny has a Bachelor's degree from the University of Pennsylvania where he was a member of the varsity baseball team and a 3-year intern for Grant Thornton's Business Advisory Services group.

Sandra Bruce, Consultant

With over 30 years of experience in consulting and public sector human resources, Sandra Bruce is a Consultant with Bolton specializing in public sector job analysis and classification.

A sample of Sandra's public sector client assignments includes Albany GA, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, Winter Park FL, and Wytheville VA.

Prior to her role at Bolton, Sandra served as a Senior Human Resources Consultant for the Georgia Department of Labor, focusing on classification and compensation reviews, COVID protocols, and strategic recruitment efforts. Prior to that, Sandra was the Human Resources Director for the Georgia Department of Defense, the state agency responsible for oversight and support of the Georgia Army and Air National Guard.

Sandra earned a Master of Public Administration from Georgia State University and a Bachelor of Arts in Political Science and English from LaGrange College. She has held her PHR certification since 2000.

V. Timing and Fees

Timing

We are prepared to begin immediately upon receiving formal approval to do so. We estimate it will take 10 to 14 weeks from the project's initiation to fully meet all staffing, classification, and compensation engagement objectives. This assumes that Madeira Beach schedules meetings and makes process approval decisions promptly and within the project timeframe. It also assumes that agencies from whom market data are requested do so within a reasonable timeframe so that data collected can be processed and employed in our market analysis.

Fees

We will charge an all-inclusive flat fee of \$34,300 to complete all objectives outlined in our proposal. This fee includes all labor, materials, travel-related expenses, and all related costs based on the defined project scope. We bill monthly as work tasks are completed.

Major pricing assumptions:

- The study will cover up to 100 employees in up to 60 unique job titles.
- We plan to work with leadership and HR to define a market strategy and develop and list of survey peers.
- We will utilize existing job descriptions to gather required job content data.
- We also will also interview department heads to address specific functional duties and positions.
- Market survey will cover pay and pay practices using Bolton's TRDx from up to 30 survey invitees.
- We will also develop rates at the 25th, 50th, and 75th percentiles from published data sources on as many jobs as possible.
- Our pricing is good for 120 days from the date of the proposal.

Our proposal and fees do not include a market comparison of Health, Welfare, PTO, retirement and other benefits, nor do they include the cost of updating job descriptions. Should Madeira Beach desire one or both of these services, the additional fee would be:

- \$8,000 for the total benefits market study.
- \$7,500 for job descriptions.

Bolton

Benefits, Actuarial, Investment & Compensation Consulting

RFP #2024-01 HR, Classification, and Compensation Plans Study

Proposed Consulting Services

February 8, 2024

Appendix



City Of
Florida
Madeira Beach
Managing Director, Practice Lead
1200 Wilson Boulevard | Suite 810
Arlington, VA 22201
(202) 670-5820
djripberger@boltonusa.com

Appendix: Bolton Public Sector Clients

Anne Arundel Community College, MD
 Anne Arundel County, MD Government
 Anne Arundel County, MD Public Library
 Baltimore County, MD Government
 Baltimore County, MD Public Schools
 Baltimore County, MD Revenue Authority
 Bedford County, VA
 Bedford County, VA Public Schools
 Bedford Regional Water Authority
 Broward County, FL
 Buffalo, NY Public Schools
 Calvert County, MD
 Calvert County, MD Public Schools
 Caroline County, MD Board of Education
 Caroline County, MD Government
 Caroline County, MD Public Schools
 Carroll County Community College, MD
 Carroll County, MD
 Carroll County, MD Public Schools
 Cattaraugus County, NY
 Cecil County, MD Commissioners
 Cecil County, MD Government
 Cecil County, MD Public Schools
 Charles County, MD Government
 Charles County, MD Public Schools
 Charles County, MD Sheriff's Office
 Charlotte-Mecklenburg, NC Schools
 Chatham County, GA
 Cherokee County, GA
 Chesapeake, VA Public Schools
 Chicago Regional Transportation Authority
 City of Ada, OK
 City of Austin, TX
 City of Albany, GA
 City of Baltimore, MD
 City of Boca Raton, FL
 City of Bowie, MD
 City of Cambridge, MD
 City of Cape Coral, FL
 City of Chesapeake, VA
 City of Cocoa, FL
 City of Doral, FL
 City of Dover, DE
 City of Dunedin, FL

City of El Paso, TX
 City of Flagler Beach, FL
 City of Fond du Lac, WI
 City of Fort Myers Shores, FL
 City of Frederick, MD
 City of Fredericksburg, VA
 City of Gaithersburg, MD
 City of Greenbelt, MD
 City of Griffin, GA
 City of Hialeah Gardens, FL
 City of Hollywood, FL
 City of Hyattsville, MD
 City of Lake Mary, FL
 City of Lakeland, FL
 City of Laramie, WY
 City of Laurel, MD
 City of Lexington, VA
 City of Maitland, FL
 City of Manassas, VA
 City of Manassas, VA Public Schools
 City of Melbourne, FL
 City of Miami Gardens, FL
 City of Middletown, OH
 City of Miramar, FL
 City of New Smyrna Beach, FL
 City of New York, NY
 City of Newark, DE
 City of North Fort Myers, FL
 City of Norwich, CT
 City of Orlando, FL
 City of Palm Beach Gardens, FL
 City of Pittsburgh, PA
 City of Plainfield, NJ
 City of Pocomoke, MD
 City of Pompano Beach, FL
 City of Providence, RI
 City of Reading, PA
 City of Riviera Beach, FL
 City of Rockville, MD
 City of Salisbury, MD
 City of Sanford, FL
 City of Sarasota, FL
 City of Takoma Park, MD
 City of West Palm Beach, FL

City of Westminster, MD
 City of Wilmington, DE
 City of Winchester, VA
 City of Winter Park, FL
 Clay County Board of Commissioners, FL
 Clay County Sheriff's Office, FL
 Clay County, TX
 Columbia County, FL
 College of Southern Maryland
 Colorado Department of Health Care
 Community College of Baltimore County
 County of Albemarle, VA
 County of Culpeper, VA
 County of Hawaii, HI
 County of Lancaster, PA
 Coweta County, GA
 Culpeper County, VA Schools
 Dawson County, GA School System
 Delaware River & Bay Authority
 Delaware Transit Corporation
 Department of Justice
 Dinwiddie County, VA
 Dinwiddie County, VA School Board
 District of Columbia Retirement Board
 Dorchester County, MD
 Dorchester County, MD Board of Education
 Eastern Iowa Airport (CID)
 Eastern Shore of Maryland
 Emerald Coast, FL Utilities
 Employees Retirement System of Texas
 Fauquier County, VA
 Florida Department of Financial Services
 Fond du Lac County, WI
 Fort Myers Shore Fire, FL
 Frederick Community College, MD
 Frederick County, MD Government
 Frederick County, MD Public Schools
 Frederick County, VA Government
 Frederick County, VA Public Schools
 Garrett County, MD Government
 Garrett County, MD Public Schools
 Gloucester County, VA
 Hallandale Beach, FL
 Hampton Roads, VA Sanitation

Appendix: Bolton Public Sector Clients

Hanover County, VA Government
 Harford Community College, MD
 Harford County, MD
 Harford County, MD Public Library
 Harford County, MD Public Schools
 Harford County Sheriff's Office, MD
 Hazleton City, PA Pension Board
 Higher Ground Education
 Highlands County, FL
 Housing Authority of Baltimore City, MD
 Howard Community College
 Howard County, MD Government
 Howard County, MD Library
 Howard County, MD Public School System
 Indian Trail Improvement District
 Inter-University Council of Ohio
 Ithaca City, NY School District
 Jacksonville, FL Transportation Authority
 James City County, VA
 Kent County, MD Government
 Kent County, MD Levy Court
 Kent County, MD Public Schools
 Kenton County Airport Board (CVG)
 King George County & Schools, VA
 King William County, VA
 Lake Worth, FL Drainage District
 Lehigh Acres, FL Fire Control
 Loudoun County, VA Public Schools
 Loudoun County, VA Sanitation Authority
 Lower Merion Township, PA
 Macon-Bibb County, GA
 Manassas Park, VA City Schools
 Manatee County, FL
 Maryland Dept of Legislative Services
 Maryland State Retirement Agency
 Metropolitan Water Reclamation
 Milwaukee County, WI
 Monroe County, FL
 Montgomery County, MD Council
 Montgomery County, MD Government
 Montgomery County, MD Public Schools
 New Hampshire Public Employees
 New Horizons Regional Education Center
 New Jersey Transit Corporation

New Kent County, VA Public Schools
 New York Power Authority
 New York State Thruway
 Newport News, VA Public Schools
 Niagara Frontier Transportation Authority
 Northampton County, PA
 North Fort Myers, FL Fire District
 Ocean County, NJ Utilities Authority
 Oneida County, NY
 Orange County, VA
 Oswego City, NY School District
 Palm Harbor, FL Fire Rescue
 Pennsylvania State Education
 Philadelphia, PA Parking Authority
 Port LaBelle, FL
 Postal Regulatory Commission
 Prince George's Community College MD
 Prince George's County, MD Government
 Prince George's County, MD Schools
 Prince William County, VA Schools
 Prince William County, VA
 Queen Anne's County, MD Board of Education
 Queen Anne's County, MD Government
 Queen Anne's County, MD Public Schools
 Rappahannock County, VA
 Rappahannock County, VA Public Schools
 Regional Income Tax Agency
 Roanoke County, VA
 Roanoke County, VA Public Schools
 Rockingham County, VA Government
 Rockingham County, VA Public Schools
 San Jose Police Officers Association, CA
 San Luis Obispo County, CA Pension Trust
 Santa Rosa County, FL
 School District of Philadelphia, PA
 Shenandoah Valley Juvenile Center
 Somerset County, NJ Board of Education
 South Central Wastewater
 South Florida Conservancy District
 Spotsylvania County, VA Government
 Spotsylvania County, VA Public Schools
 St. Lucie County, FL Fire District
 St. Mary's County, MD Government
 St. Mary's County, MD Library

St. Mary's County, MD Public Schools
 St. Mary's County, MD Sheriff's Office
 Stafford County, VA Government
 Stafford County, VA Public Schools
 State of Alaska
 State of Maine
 State of Maryland
 State of Montana
 State of Oregon
 State of West Virginia
 State of Wisconsin
 Stevenson University
 Suffolk County Community College, NY
 Talbot County, MD
 Talbot County, MD Board of Education
 Thomas County, GA School District
 Town of Centreville, MD
 Town of Chestertown, MD
 Town of Colmar Manor, MD
 Town of Cutler Bay, FL
 Town of Davie, FL
 Town of Edison, NJ
 Town of Elkton, MD
 Town of Juno Beach, FL
 Town of Kilmarnock, VA
 Town of Leesburg, VA
 Town of Mount Airy, MD
 Town of Ocean City, MD
 Town of Orange, VA
 Town of Riverdale Park, MD
 Town of Sykesville, MD
 Town of Thurmont, MD
 Town of University Park, MD
 Town of Wytheville, VA
 Upper Occoquan Service Authority
 Vernon-Verona Sherrill Central Schools, NY
 Village of Oak Park, IL
 Village of Royal Palm Beach, FL
 Washington County, FL
 Washington County, MD
 Washington County, MD Public Schools
 Washington Suburban Sanitary Comm
 West Virginia Municipal Pension Oversight Board
 West Virginia State Police

Appendix: Bolton Public Sector Clients

Wicomico County, MD Board of Education
Wicomico County, MD Government
Williamsburg-James City, VA Schools
Worcester County, MD Board of Education
Wor-Wic Community College, MD

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Dan Ripberger, Managing Director
[print individual's name and title]

Bolton Partners, Inc.; DBA Bolton for
[print name of entity submitting sworn statement]

whose business address is: 1 West Pennsylvania Ave., Suite 600, Towson, MD 21204 FEIN: 52-1231144 and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
- (iv) the penalties that may be imposed upon employees for drug abuse violations.

- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
- (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president.

In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: [Handwritten Signature]
Title: Managing Director
Company: Bolton Partners, Inc.; DBA Bolton

NOTARY PUBLIC

MARYLAND
STATE OF ~~FLORIDA~~
CITY OF Towson

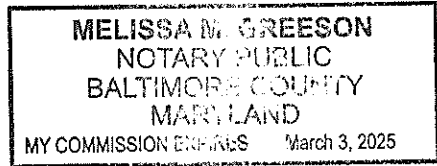
Sworn to and subscribed before me this day of February 7, 2024.

by Dan Ripberger who

is personally known to me OR Produced identification

_____ [type of
identification] My commission expires 3/3/25

Notary Public Signature [Handwritten Signature]
[Print, type or stamp Commissioned name of Notary Public]



Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent _____ Title Managing Director
[Handwritten Signature]

Printed Name Dan Ripberger Date February 7, 2024

Cody & Associates, Inc.

220 Jamaica Dr. Cocoa Beach, FL 32931
Phone: 321/783-9552 Fax: 321/613-3962

Proposal for a HR, Classification, and Compensation Study for the City of Madeira Beach

RFP NO.: 2024-01



Table of Contents

HR, CLASSIFICATION, AND COMPENSATION STUDY

	<u>Page</u>
TRANSMITTAL LETTER.....	1
PROPOSER'S EXPERIENCE AND QUALIFICATIONS.....	2
LIST OF CLIENTS	4
REFERENCES.....	5
UNDERSTANDING AND APPROACH	6
ESTIATED TIME FOR COMPLETION	7
COST	8
REQUIRED FORMS	9

Transmittal Letter

Cody & Associates, Inc.

220 Jamaica Dr. Cocoa Beach, FL 32931
Phone: 321/783-9552 Fax: 321/613-3962

February 06, 2024

City of Madeira Beach
Attention: City Clerk
Madeira Beach, FL 33708

Cody & Associates, Inc. is pleased to submit this quote to conduct an **HR, Classification, and Compensation Study** for the City of Madeira Beach.

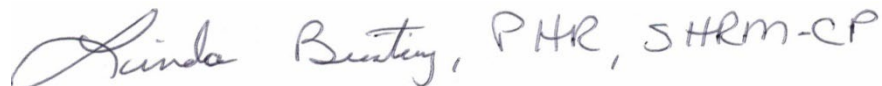
The approach to the project and detailed work plan is included in this proposal. We understand and can perform the scope of services requested and the assistance you require in this Study. We have conducted compensation and classification studies to numerous public sector clients in the state of Florida and understand the Florida market, and the changes incurred by the increased minimum wage.

Thank you for the opportunity to assist the City in this study. We look forward to discussing our quote with you in greater detail.

The person who is authorized to make representations for *Cody & Associates, Inc.* is: Linda Bunting; Address: 220 Jamaica Dr., Cocoa Beach, FL 32931; phone number: (321)783-9552; Fax number: 321/631-3962; email: Lbunting@codyassiates.org.

The terms, conditions, and prices for this study are valid for a period of one hundred eighty (180) days.

Sincerely,



Linda Bunting, PHR, SHRM-CP
President

PROPOSER'S EXPERIENCE AND QUALIFICATIONS

Cody & Associates, Inc. is a small Human Resources consulting firm specializing in Classification and Compensation for government entities in the state of Florida. We have three full time employees with additional support staff. Our office is located in Cocoa Beach, Florida.

Cody & Associates, Inc. is a Florida based and incorporated management consulting company which was established in 1974.

Cody & Associates, Inc. has provided Wage, Salary and Classification services to over 900 clients including municipal and county government agencies in the State of Florida. We have worked with municipal utilities, bargaining, and non-bargaining positions. We know the Florida market. With the annual increases to the minimum wage this has driven wages up overall. We design a pay plan that aligns with our clients' structure (internal relationship) and is competitive with their market (external relationship).

Our company is known for its outstanding work product and works very closely with our clients to resolve their problems and fulfill their needs. *Cody & Associates, Inc.* communicates with our clients to render a personalized management consulting service.

Linda Bunting works personally on all studies and has support staff to assist. She is involved in all aspects of the studies and works closely with clients to provide a pay plan that works for them. We offer implementation options that fit with our client's budget and can discuss options on how to implement. Linda took over as President in 2016, after working for *Cody & Associates* for over 12 years. We provide free follow-up for our clients for a year after completing a study. This includes analyzing new positions and providing a pay range for the positions. We are a Florida based company and understand the Florida market. Over the last few years, we have seen the most aggressive changes in pay in Florida. This was based on the increase in minimum wage, the employee shortage, and the high inflation. We have many contacts with government entities which helps us keep a pulse on what is going on with compensation as well as employment trends. This is what sets us apart.

Cody & Associates is experienced in the scope of work the City is requesting and can complete the study to meet your needs.

It is important that you know the specific consultants to be assigned to the day-to-day conduct of the study.

LINDA BUNTING, SHRM-CP, PHR, President, has a Bachelor's in Business Administration from University of Phoenix and holds a SHRM-CP and a Professional in Human Resources from the HR Certification Institute.

Linda has over twenty years of professional experience in classification analysis, wage and salary administration, and benefit analysis and administration for Florida municipal and County customers. Linda has been Project Manager on over 250 studies. Linda works out of our Cocoa Beach Office, which will be the primary work site for the study and will function as the Project Team Manager.

Ms. Bunting's specific responsibilities on this project:

- Directs the overall direction of the Project Plan.
- Works directly with the Client's staff on a day-to-day basis.
- Authority to speak for the Consultant in all study areas.
- Conducts the on-site analysis and develop recommendations.
- Directs the data collection.

LYNN BYRD, Consultant, has a Bachelor's Degree from University of South Florida, Tampa, Florida Lynn has eleven (11) years of professional experience in classification and compensation, and job analysis with Cody & Associates.

Lynn's specific responsibilities on this project:

- Assist in the overall direction of the Project Plan.
- Work indirectly with the client's staff.
- Conducts data collection.

DONNA HUDSON, Administrative Manager

Donna has over ten (10) years administrative support and data collection for Cody & Associates.

Donna's specific responsibilities on this project:

- Job Description updates
- Posting salary data
- Benefit Analysis
- Work's indirectly with client's staff

We have additional support staff to assist in data collection, compilation, and other functions as needed.

Below is a list of government contracts completed in the last three years. They are all classification and compensation studies unless otherwise stated::

- City of New Port Richey
- Collier County (Salary Survey)
- Collier Tax Collector
- City of New Port Richey Fire only
- Seacoast Utilities Authority
- Sun n Lake
- City of Bushnell
- City of Palmetto
- Nassau Clerk of Courts
- City of Valparaiso
- City of Ormond Beach
- Citrus Mosquito Control
- Lee County Tax Collector
- City of Plant City (Full Study)
- City of Ormond Beach
- Lee County Clerk of Courts
- City of Jacksonville Beach
- Emerald Coast Utilities Authority
- Sumter County Property Appraiser
- City of Satellite Beach
- Pasco Mosquito Control
- Charlotte County Tax Collector
- Lakewood Ranch
- St. Lucie Tax Collector
- City of Frostproof
- City of Crescent City
- Collier Tax Collector
- Sarasota County (select positions only)
- Polk County
- Central Florida Expressway Authority
- Town of Southwest Ranches

REFERENCES

The below references are just a few of our recently completed projects.

Polk County - 330 West Church St; Bartow, FL 33831

Kandis Buford, Equity and HR Director 863/534-6587

KandisBuford@polk-county.net

Compensation Study - 8/1/2022 – 2/16/2023 Cody & Associates, Inc.

City of Jacksonville Beach - 11 North Third St.; Jacksonville Beach, FL 32250

Kimberlee Bennett, Director of Human Resources 904/247-6111

Kbennett@jaxbchfl.net

Classification and Compensation Study with Benefits – 1/19/2022 – 6/1/2022

City of Ormond Beach – 22 South Beach Street, Ormond Beach, FL 32174

Claire Whitley, Assistant City Manager 386/676-3202

Claire.Whitley@ormondbeach.org

Classification and Compensation Study – 10/15/2021 – 3/15/2022 Cody & Associates, Inc.

Central Florida Expressway Authority – 4974 ORL Tower Road, Orlando, FL 32807

Evelyn Wilson, Chief Human Resources Officer 407/690-5317

Evelyn.Wilson@cfxway.com

Compensation Study 11/30/2022 – 1/30/2023 Cody & Associates, Inc. conducted a complete compensation study for the Expressway. We completed the study in a timely manner. We have worked with the Authority multiple times over the past nine years.

UNDERSTANDING AND APPROACH

(This can be discussed in further detail)

This section describes the work plan that *Cody & Associates, Inc.* will utilize for the project and includes specific tasks or steps. Our consultants will work closely with the City's staff to ensure that they have complete understanding of the study.

➤ **INTRODUCTION AND PROJECT ORIENTATION**

The Consultant will conduct initial meetings with the City's HR staff to discuss the current classification and pay plan, pay practices, performance evaluation scoring methodology, and philosophy of compensation and finalize the scope of work. Discussions with all department heads to discuss department concerns will also be held.

➤ **EVALUATE PAY POLICIES AND PRACTICES**

The consultant will evaluate existing pay policies and practices including additional monetary incentives.

➤ **POINT FACTOR JOB EVALUATION SYSTEM**

- The *Cody & Associates, Inc.* Point Factor Job Evaluation System is a logical, systematic and orderly method of gathering facts about jobs. It requires the application of value judgments in a standardized and understandable way. The objective is to ensure consistency and equity of results in evaluating jobs.
- One purpose of this quantitative job evaluation system is to set the value of a position by determining a numerical score for each job based on job-related tasks, duties and conditions of work performed.
- Positions which require approximately equal levels of skills, efforts, responsibilities and working conditions are placed into the same level for job difficulty comparisons. The comparable difficulty of a position is therefore measured within an organization unit or agency.
- The point factor comparison cross compares jobs against all other positions in the organization using all job factors.

➤ **SALARY SURVEY/MARKET PRICING**

The objective of this survey will be to determine what must be provided in terms of salaries in order to be competitive with other employers recruiting in your labor market.

The Consultant will select "benchmark" classes from the classification plan to be utilized in the salary survey. These jobs will represent a cross-section of occupations and pay levels within the pay system. The benchmarks will include those occupations which can be accurately compared with other employers included in the survey. The relevant labor market to be surveyed will be agreed upon with the City and the Consultant.

➤ **INTERPRETATION OF SALARY DATA**

This is the most important step in the salary schedule design. Since the Consultant has conducted several similar studies for many similar agencies, Cody & Associates, Inc. understands what jobs are comparable, regardless of titles assigned. The Consultant will provide a report showing a summary of the salary data results.

➤ **DEVELOPMENT OF PAY GRADES AND SALARY STRUCTURE**

Based on the job evaluation and analysis of the salary survey data, Cody & Associates, Inc. will design a salary structure for all jobs. This step will transform the data from the salary survey into specific salary ranges that progress in a regular manner across all levels. Salary compression between positions will be addressed during this step.

➤ **PREPARATION OF REPORT**

Cody & Associates, Inc. will prepare and present report which will include all the details of the project.

➤ **IMPLEMENTATION AND FOLLOW-UP ASSISTANCE**

Cody & Associates, Inc. will develop a complete implementation plan covering various workable alternative which address compression with associated costs. *Cody & Associates, Inc.* will have a staff member available to answer any questions for a twelve (12) month period concerning recommendations resulting from the project and provide continuing assistance (at no additional cost) during this period.

➤ **ESTIMATED PROJECT TIME**

The estimated time to complete the project is approximately 3 months.

➤ **COST**

Cost to conduct an HR, Classification, and Compensation Study will not exceed \$13,500. This includes up to three visits to the City.

Additional Cost options:

Benefits - \$1,500

Job Descriptions Updated: \$2,200

PART C:**PROPOSAL RESPONSE REQUIREMENTS**

1. *The total number of pages in the proposal shall not exceed 15 pages.*
2. Prepare a brief introduction including a general demonstration of understanding of the scope and complexity of the required work as well as:

Company Cody & Associates, Inc.

Address: 220 Jamaica Dr. Cocoa Beach, FL 32931

Phone #: 321/783-9552

Email Address: Lbunting@codyassociates.org

Name of Authorized Representative: Linda Bunting

1. **Introduction** – On a cover sheet to the proposal, provide the official name, address, phone number and fax number of the applicant, as well as the name of the principal contact person and the name of the person authorized to execute the contract.
2. **Experience and Qualifications** –
 - a. A brief description of the experiences and qualifications.
 - b. Listing and bios of proposed staff member(s) who will be performing the services.
 - c. A brief description of the organization.
 - d. A list of cities for which the consultant has conducted the comprehensive classification and compensation studies (within the past five years).
 - e. A list of three recent client references, including telephone numbers, email addresses, and addresses.
3. **Approach/Methods Used to perform the Project** – Detailed description of the services and methods by which the work set forth in the RFP will be performed. The description shall include the following items:
 - a. Proposer's understanding of the services to be provided.
 - b. Complete methodology to be used in determining benchmark positions, other cities and counties to include in the survey, and determining salary ranges.
 - c. Description of the system you utilize to determine internal equity.
 - d. Description/philosophy in determining market rates and how that relates to individual classification and what connection that might be to the pay table. Also, provide a description on how you determine minimums and maximums on the pay table.
 - e. Estimated time the project will take from beginning to completion date.

- 4. **Cost Proposal** – This section should contain a complete breakdown of all costs relating to the content of the proposal, including the maximized total cost, as well as an itemized breakdown of the compensation required to accomplish the full performance of all tasks outlined in the proposal. Upon selection, it is expected that the consultant will make a minimum of 2 visits to the City. One to kick off the project to include meetings with staff to discuss issues and a meeting to present findings to the Civil Service Commission, the Board of Commissioners, the City Manager, and select staff.
- 5. **Materials to Submit** – Interested firms must submit eight copies of their proposal and one copy (USB – PDF Format). All bid proposals must be submitted in person or by mail to the Attention of the City Manager no later than Friday, February 9, 2024, at 3:00 p.m., at which time the sealed bid proposals will be opened in a public meeting for that purpose. ALL bid proposals must be clearly marked “SEALED” outside the package. The address to submit the seal bid proposals:

City of Madeira Beach
 Attention: Robin I. Gomez, City Manager
 300 Municipal Drive
 Madeira Beach, FL 33777

- 6. **Review Process** – The City of MADEIRA BEACH reserves the right to reject any or all submittals. The City may request one or more firms to provide a detailed proposal.

7. **References:**

(A) Name of Entity: Polk County BOCC
 Nature of Services Provided: Classification and Compensation Study

Contact Name: Kandis Buford, Equity and HR Director
 Contact Phone Number: 863/534-6587

(B) Name of Entity: City of Jacksonville Beach
 Nature of Services Provided: Classification and Compensation Study

Contact Name: Kimberlee Bennett, Director of Human Resources
 Contact Phone Number: 904/247-6111

(C) Name of Entity: City of Ormond Beach
 Nature of Services Provided: Classification and Compensation Study

Contact Name: Claire Whitley, Assistant City Manager
 Contact Phone Number: 386/676-3202

City of Madeira Beach
RFP 24-01

COMPLIANCE WITH ALL APPLICABLE LAWS

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Linda Bunting, President

[print individual's name and title]

_____ for Cody & Associates, Inc.

[print name of entity submitting sworn statement]

whose business address is: 220 Jamaica Dr. Cocoa Beach, FL 32931 and (if applicable) its Federal Employer Identification Number (FEIN) is 59-1500031 (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and

City of Madeira Beach

RFP 24-01

- (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
 - (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

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- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: [Handwritten Signature]
Title: President
Company: Cody & Associates, Inc.

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF Brevard

Sworn to and subscribed before me this 6th day of Feb., 2024.

by Linda Bunting who

is personally known to me OR Produced identification

FLDL [type of

identification] My commission expires Aug 23, 2024

Notary Public Signature [Handwritten Signature]
[Print, type or stamp Commissioned name of Notary Public]

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent

Title

[Handwritten Signature]

President

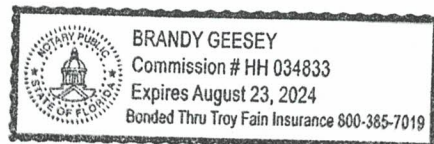
Printed Name

Date

Linda Bunting

February 06, 2023

City of Madeira Beach
RFP 24-01



A Proposal to Conduct an HR, Classification and Compensation Plans Study for the City of Madeira Beach, FL

ORIGINAL



Evergreen Solutions, LLC

February 9, 2024

Response to Request for Proposal

Evergreen Solutions is well qualified to conduct a HR, Classification and Compensation Plans Study for the City of Madeira Beach due to our experience in conducting more than 1,200 similar studies for local governments and other public sector organizations across the country, especially in the State of Florida. As required in the Request for Proposal (RFP #2024-01), we have limited our responses due to the page limitations for each section. We have attached the Drug Free Workplace Certification.

1. Experience and Qualifications

In this section, we provide you with our experience and qualifications for conducting the HR, Classification and Compensation Plans Study the City of Madeira Beach; a brief description of the firm; a list of cities we have conducted comprehensive classification and compensation studies for; a listing and bios of proposed staff; and references.

1.1 Description of Firm

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

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

Evergreen employs 29 full- and nine part-time staff who provide a variety of human resources consulting work. Evergreen is located at 2528 Barrington Circle, Unit 201, Tallahassee, Florida. The authorized representative for Evergreen is Dr. Jeff Ling, President, who can be reached at (850) 383-0111 or via email at jeff@consultevergreen.com.

Evergreen’s 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 surveys; performance appraisal reviews; workload analyses; staffing studies; HR department reviews; disparity studies; efficiency studies; training assessments; and strategic planning.

Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes: full visibility into the entire organization through research and discovery; a spirit of partnership with staff and leadership; sound recommendations based on best practices and proven methods; and a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have: extensive experience in conducting HR, classification and compensation plan studies for local governments and other public sector organizations throughout the country, including Florida; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant Florida 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.



1.2 List of Cities

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. Because Evergreen has conducted more than 1,200 projects that are similar in scope to the services being requested, we have identified in **Exhibit 1**, a list of some of our similar local government work performed in Florida.

Exhibit 1: Sample List of Florida Local Government Clients

City of Alachua	City of Kissimmee	City of St. Petersburg	Martin County
City of Apalachicola	City of Lake City	City of Sunny Isles Beach	Miami-Dade County
City of Bartow	City of Largo	City of Sunrise	Miami Shores Village
City of Bunnell	City of Maitland	City of Sunrise	Monroe County
City of Bushnell	City of Marathon	City of Tallahassee	Okaloosa County
City of Cape Coral	City of Marco Island	City of Tamarac	Orange County
City of Clermont	City of Melbourne	City of Temple Terrace	Osceola County
City of Clearwater	City of Miramar	City of Titusville	Palm Beach County
City of Cooper City	City of Naples	City of Venice	Pinellas County
City of Coral Gables	City of New Smyrna Beach	City of West Melbourne	Santa Rosa County
City of Coral Springs	City of Niceville	City of Winter Park	Sarasota County
City of Dania Beach	City of North Lauderdale	City of Zephyrhills	Seminole County
City of Daytona Beach	City of North Miami Beach	Alachua County	St. Lucie County
City of Daytona Beach Shores	City of North Port	Bay County	Sumter County
City of Delray Beach	City of Oakland Park	Brevard County	Wakulla County
City of Deltona	City of Ocala	Charlotte County	Town of Belleair
City of Destin	City of Oldsmar	Citrus County	Town of Cutler Bay
City of Doral	City of Opa-Locka	Collier County	Town of Davie
City of Dunedin	City of Orange City	DeSoto County	Town of Hilliard
City of Fort Myers	City of Orlando	Escambia County	Town of Jupiter
City of Fort Walton Beach	City of Palm Bay	Flagler County	Town of Jupiter Island
City of Green Cove Springs	City of Palm Beach Gardens	Franklin County	Town of Lady Lake
City of Groveland	City of Panama City	Gulf County	Town of Lake Park
City of Haines City	City of Panama City Beach	Hardee County	Town of Longboat Key
City of Hallandale Beach	City of Parkland	Hernando County	Town of Medley
City of High Springs	City of Pensacola	Highlands County	Town of Palm Beach
City of Holly Hill	City of Plant City	Hillsborough County	Town of Ponce Inlet
City of Hollywood	City of Plantation	Jackson County	Town of Orange Park
City of Holmes Beach	City of Punta Gorda	Jefferson County	Town of Surfside
City of Homestead	City of Sarasota	Lake County	Village of Islamorada
City of Key West	City of Sebastian	Leon County	Village of North Palm Beach
City of Jacksonville	City of Sebring	Manatee County	Village of Palmetto Bay
City of Jacksonville Beach	City of Sopchoppy	Marion County	Village of Pinecrest

1.3 Bios of Proposed Project Staff

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

Dr. Jeff Ling, CCP – Project Principal (will have contractual authority over the project). Dr. Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Consultant (CCP) with more than 25 years of consulting experience in the following areas:



human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources management, compensation, classification, and operational management. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include:

- **Compensation/Classification**– He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal or Project Director for more than 1,200 public sector projects related to Classification and/or Compensation, including more than 200 in the State of Florida.**
- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption. Some of the higher institutions he has provided these services to include, but are not limited to: Howard Community College, MD; Tarrant County College District, TX, Midwestern State University, TX; Morehead State University, KY; and Seminole State College, FL.
- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

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

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



During his career, Mr. Williamson has served on boards of directors for more than two dozen public, private, civic and charitable organizations. This includes time as Chairman of the Santa Rosa County Board of County Commissioners, RESTORE Council, Tourist Development Council, Florida/Alabama Transportation Planning Organization and as a member of the Florida Gulf Consortium, Florida Association of Counties Executive Board, Leadership Santa Rosa, and the Institute for County Government to name a few. He is also a member of the Florida Rural Water Association. 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 for the City of Holmes Beach, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; a Comprehensive Compensation Study for Keys Energy Services, FL; a Compensation Study for the Indian River County Property Appraiser's Office, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Classification and Compensation Study for DeSoto County, FL; a Compensation Study for the Lake Apopka Natural Gas District, FL; a Classification and Pay Plan Study for Peace River Manasota River Water Supply Authority, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Classification and Compensation Study for the City of Apalachicola, FL; a Compensation Study for the City of Naples, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Bradenton, FL; a Compensation Study for the City of Plantation, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the Manatee County Sheriff's Office, FL; a Compensation Study for the Marion County Property Appraiser, FL; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for Barrow County, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Calhoun, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Compensation Study for the City of Duluth, GA; a Classification and Compensation Study for the City of Madison, AL; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for Auburn- Opelika Tourism, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Job Market Survey for New Braunfels Utilities, TX; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX; a Compensation and Benefits Study for the Middle Rio Grande Conservancy District, NM; a Compensation Study for the Metropolitan St. Louis Water District, MO; a Compensation Study and Analysis for McLean County, IL; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of White House, TN; Classification and



Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Compensation Study for North Charleston Sewer District, SC; a Compensation Study for the Town of Central, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC; 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 Dare County, NC; a Classification and Compensation Study for Culpeper County, VA; and HR Market Study for Botetourt County, VA; a Comprehensive Total Compensation Study for Cumberland County, PA; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Compensation Study for the City of Portsmouth, NH; and a Classification and Total Compensation Review for the City of Manchester, NH.

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.

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

A sample of some of the public sector projects that Ms. Whurr has been involved with include; a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the Indian River County Property Appraiser's Office, FL; a Classification and Pay Plan Study for the Peace River Manasota Regional Water Supply Authority, 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; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Comprehensive Compensation Study for Keys Energy Services, 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 Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for the City of Duluth, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Hampton, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Classification and Compensation Study for the City of Madison, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Moline, IL; a Compensation Study for the City of Morristown, TN; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation



Study for the City of White House, TN; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification and Total Compensation Review for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Classification and Compensation Study for the City of Southport, NC; Classification and Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Compensation Study for the North Charleston Sewer District, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; and a Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX.

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

Daniel Tejada– Project Consultant. Mr. Daniel Tejada is an Analyst with Evergreen. He has spent a significant amount of time working with Evergreen on analyzing client data and returning accurate and thorough recommendations.

Mr. Tejada's role spans the project life cycle, producing robust analyses and reporting for each project phase. His primary responsibilities include: Collecting human resources data, reviewing and analyzing market research, and returning results to better improve client recommendations.

A sample of some of public sector projects that Mr. Tejada has been involved with include: a Compensation Study for the City of Holmes Beach, FL; a Comprehensive Compensation Study for Keys Energy Services, FL; a Classification and Compensation Study for the Indian River County Property Appraiser's Office, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the Peace River Manasota Regional Water Supply Authority, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Naples, FL; a Classification study for Panama City Beach, FL; a Compensation Study for the City of Okeechobee, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation and Classification Study for Citrus County, 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 Boynton Beach, FL; a Compensation and Classification Study for the South West Florida Water Management District; a Classification and Compensation Study for the City of Hampton, GA; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Compensation and Classification Study for City of Atlanta, GA; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for the City of Madison, AL; 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 and Compensation Study for the Town of Wethersfield, CT; a Compensation and Classification Study for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Compensation Study for the City of White House, TN; a Compensation Study for the City of Morristown, TN; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for the City of Burlington, NC; Classification and Compensation Study Services for Dillion County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a



Compensation and Classification Study for Greenwood County, SC; a Compensation and Classification study for Darlington County, SC; Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX; and a Classification and Compensation Study for Amarillo College, TX.

Mr. Tejada holds a Bachelor's degree in Psychology and a Bachelor's Degree in Criminology from Florida State University.



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

1.4 References

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

Classification and Compensation Study City of Wildwood, Florida

Contact Information: Cassandra Smith, Assistant City Manager/CFO, 100 N. Main Street Wildwood, Florida 34785, (352) 661 – 6106, csmith@wildwood-fl.gov



Compensation and Classification Study City of Oldsmar, Florida

Contact information: Michelle Kutch, PHR, SHRM-CP, Human Resources Director, 100 State Street West Oldsmar, Florida 34677-3655, (813) 749 – 1110, MKutch@myoldsmar.com



Classification and Compensation Study City of New Port Richey, Florida

Contact Information: Ms. Bernie Wharran, SHRM-CP, Human Resources/Risk Manager, 5919 Main Street, New Port Richey, FL 34652, (727) 853 – 1026, WharranB@cityofnewportrichey.org



2. Approach/Methods Used to Perform the Project

In this section, we provide you with our understanding of the services to be provided, our approach and methodology for conducting the HR, Classification and Compensation Plans Study for the City of Madeira Beach; a detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of services of the Request for Proposal (RFP); and a proposed timeline.



2.1 Understanding of the Services to be Provided

Evergreen understands that according to the scope of services of the Request for Proposal, the City desires the following tasks to be performed:

- *review and evaluate Human Resources/Personnel processes relative to all City job classifications and compensation;*
- *review and evaluate all current job classifications to ensure compliance with federal, state, and local laws and regulations including the Fair Labor Standards Act, exempt/non-exempt classifications, and all other applicable personnel provisions;*
- *review all current job classifications, confirm, and recommend changes to hierarchical order of jobs using your evaluation system;*
- *establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers);*
- *identify potential pay compression issues and provide potential solutions; and*
- *analyze and recommend changes to the present compensation matrix and/or structure to meet the market analysis.*

2.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a HR, Classification and Compensation Plans Study for the City of Madeira Beach 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 implementation strategy that: focuses on market competitiveness; based on the organization’s compensation philosophy; recognizes that compensation is comprised of more than 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 based meet your overall needs; and produced a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that included both public and private sector employees.

We will work closely with the City’s designated Project Manager and the Human Resources Department throughout the process to ensure constant communication of issues, concerns, and potential outcomes. We work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen will work with you to balance your need to meet your performance goals while carefully managing 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.

2.3 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the HR, Classification, and Comprehensive Plans Study for the City of Madeira Beach is provided in this section. Evergreen understands that the City has approximately 83 employees representing 59 classifications that will be included in the study.

Our work plan consists of the following 11 work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data
- Task 4: Evaluate and Build Projected Classification Plan and Make FLSA Determinations
- Task 5: Identify List of Market Survey 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 Updated 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; and establish an agreeable final timeline for all project milestones and deliverables.

TASK ACTIVITIES

- 1.1 Discuss with City's Project Manager (CPM) and any other key personnel the following objectives: the classification and pay plan study processes; 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 department and divisions, along with related responsibility descriptions; current position and classification descriptions; salary schedule(s), and classification systems; and personnel policies and procedures, including step placement policies.
- 1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.



1.5 Provide frequent updates to the CPM throughout the study.

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

Task 2.0 – Evaluate the Current System

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

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s) and structure for the City. Identify potential pay compression issues and provide potential solutions.
- 2.3 Review and evaluate HR personnel processes relative to all City classifications.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES: Review of existing compensation plan(s); pay compression issues and solutions; and 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 and guide subsequent analytical tasks.

TASK ACTIVITIES

- 3.1 Schedule and conduct employee orientation sessions to describe the scope of work and methodology.
- 3.2 Interview department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with CPM and Human Resources to administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT). Our staff utilizes a web-based tool for data collection. Paper copies can be provided for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.
- 3.5 Review any data provided by the City that may provide additional relevant insight.

KEY PROJECT MILESTONES: Job assessment tool distribution; department head interviews; and employee focus groups and orientation sessions



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

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

TASK ACTIVITIES

- 4.1 Ensure that all draft class specifications 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 any additional follow-ups 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 Identify career ladders/promotional opportunities as deemed appropriate.
- 4.8 Review all recommendations with the CPM.

KEY PROJECT MILESTONES: Job evaluation scores by class; recommended classification changes; recommended FLSA status; and preliminary job structure based on internal equity

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

TASK GOALS: Reach an appropriate number and identify the proper benchmark positions for the external labor market salary and benefits assessment and identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary and benefits.

TASK ACTIVITIES

- 5.1 Identify, from the initial review; a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will use all 59 classifications as benchmarks for the salary survey.
- 5.2 Finalize list of benchmarks with the CPM.
- 5.3 For each employee group review with the CPM peer organizations to use as targets for the salary and benefits survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary and benefits survey.
- 5.4 Develop a preliminary list of public and private organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as: size of organization; geographic proximity to Madeira Beach; economic and budget characteristics; and other demographic data.
- 5.5 Develop a list of survey targets by employee group. Develop a system for use of private sector secondary data including the potential sources and weighting of secondary data, if necessary.



- 5.6 Review survey methodology with the CPM and refine survey methodology prior to distribution of surveys.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

KEY PROJECT MILESTONES: Final list of benchmark positions for the external labor market assessment; initial list of survey peers; survey methodology; and 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; and provide a summary of 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 with the CPM questions and categories for the market survey.
- 6.2 Develop a listing of the current benefits provided by the City for comparisons with peer organizations.
- 6.3 Using the list of City provided benefits and major benefits offerings not provided by the City develop a list of benefits to include in the external labor market survey.
- 6.4 Prepare benefits survey to be included with salary survey developed in **Task 6.1**.
- 6.5 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 salary survey instrument; benefits survey instrument; and summary report of external labor market salary and benefits assessment results

Task 7.0 – Develop Strategic Positioning Recommendations

TASK GOALS: Assess the appropriateness of the current compensation philosophy for the City and develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 7.1 Identify the compensation philosophy and accompanying thresholds.
- 7.2 Using the market salary data collected in **Task 6.0** and the classification data reviewed in **Task 4.0**, recommend the appropriate pay plan(s) for employees of the City.
- 7.3 Produce a pay plan for the City that meets its needs from an internal and external equity standpoint.



KEY PROJECT MILESTONES: Proposed compensation strategic direction, taking into account external equity and 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 options for implementation.

TASK ACTIVITIES

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed plan for the City .
- 8.2 Place all classifications into pay grades based on **Task Activity 9.1**. 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 compensation and classification analysis. Identify and prepare a range of compensation policy alternatives.
- 8.4 Meet with the CPM to discuss the potential solutions.
- 8.5 Determine the best solution to meet the needs of the City in the short-term and long-term.
- 8.6 Document the accepted solution.

KEY PROJECT MILESTONES: Initial market analysis; potential solutions; and documented final solution

Task 9.0 – Develop and Submit Draft and Final Reports

TASK GOALS: Develop and submit a draft and final report of the HR, Classification and Compensation Plans Study to the City of Madeira Beach and present the final report.

TASK ACTIVITIES

- 9.1 Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the CPM with a draft final report for review that will include all costs associated with all recommendations as well as implementation strategies.
- 9.2 Make edits and submit necessary copies of the final report to the CPM.
- 9.3 Present the Final Report.
- 9.4 Develop a communication plan for sharing study results with employees of the City.
- 9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES: Draft and final reports; final presentation; communication plan; and 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 recommendations and guidelines for the 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 positions; the proper mix of pay and benefits; how often to adjust pay scaled and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.
- 10.2 Recommend recruitment/retention strategies, where appropriate.
- 10.3 Finalize recommendations.
- 10.4 Provide training and tools to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's **JobForce Manager** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

KEY PROJECT MILESTONES: Recommendations for compensation administration; recommendations for recruitment/retention policies; and training of Evergreen's **JobForce Manager** Tool

Task 11.0 – Provide Revised Class Descriptions

TASK GOALS: Update existing class descriptions; create new class descriptions as needed, ensuring ADA, FLSA, EEO, etc. requirement satisfaction; and provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

TASK ACTIVITIES

- 11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.
- 11.2 Discuss any necessary changes to the class description format with the CPM.
- 11.3 Update classification descriptions based on data gathered from the job evaluation process and create new class descriptions based on Evergreen's proposed classification structure by leveraging data from the job evaluation process, if available.
- 11.4 Recommend a systematic, regular process for reviewing class descriptions.

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

2.4 **Proposed Timeline**

Evergreen possesses the ability, staff, skills, and tools to conduct the HR, Classification, and Compensation Plans Study in approximately four months of the project start date and following the signing of the contract. This is based on a tentative start date of April 15, 2024, and a completion date of August 15, 2024.

Our proposed timeline, as identified in **Exhibit 2**, can be modified in any way to best meet the needs of the City.



Exhibit 2 Proposed Timeline

PROJECT TASKS	2024				
	APR	MAY	JUN	JUL	AUG
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				■	■

3. Cost Proposal

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

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 2.2** of our proposal is **\$35,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two onsite visits to the City to conduct the full study as most of the work can be performed virtually.

Our preferred invoicing schedule is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 25% - upon completion of Tasks 5 – 6
- 15% - upon completion of Tasks 7 – 10
- 10% - upon completion of Task 11

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



COMPLIANCE WITH ALL APPLICABLE LAWS

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Dr. Jeff Ludwig
[print individual's name and title]

President for Evergreen Solutions
[print name of entity submitting sworn statement]

whose business address is: 2528 Barrington Cir, Tallahassee, FL 32308 and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: 20-1833438)

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and

- (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
 - (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections
 - (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: [Handwritten Signature]
Title: President
Company: Evergreen Solutions

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF Tallahassee

Sworn to and subscribed before me this 2nd day of Feb, 2024.

by Dr. Jeff Ling who

is personally known to me OR Produced identification

[type of identification] My commission expires 10/23/27



Notary Public Signature
[Print, type or stamp Commissioned name of Notary Public]

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent [Handwritten Signature] Title President

Printed Name Dr. Jeff Ling, D Date 2/8/2024

City of Madeira Beach

*Gallagher Response to Request for Proposal #2024-01
HR, Classification, and Compensation Plans Study*

February 9, 2024

Mr. Ronnie Charles, SPHR, GPHR, IPMA-SCP

National Managing Director & Practice Leader | Public Sector & Higher Education

651.234.0848 | Ronnie_Charles@ajg.com

Mr. Erik Smetana, MBA, SPHR, SHRM-SCP

Managing Director & Operations Leader | Public Sector & Higher Education

314.494.4849 | Erik_HenrySmetana@ajg.com

Gallagher Benefit Services, Inc. | ajg.com



Gallagher

Insurance | Risk Management | Consulting

Table of Contents

- 1. Introduction 1**
- 2. Experience and Qualifications 2**
 - a. A brief description of the experiences and qualifications..... 2
 - b. Listing and bios of proposed staff member(s) who will be performing the services..... 2
 - c. A brief description of the organization..... 6
 - d. A list of cities for which the consultant has conducted the comprehensive classification and compensation studies (within the past five years)..... 7
 - e. A list of three recent client references, including telephone numbers, email addresses, and addresses..... 9
- 3. Approach/Methods Used to perform the Project..... 9**
 - a. Proposer’s understanding of the services to be provided..... 9
 - b. Complete methodology to be used in determining benchmark positions, other cities and counties to include in the survey, and determining salary ranges..... 9
 - c. Description of the system you utilize to determine internal equity..... 11
 - d. Description/philosophy in determining market rates and how that relates to individual classification and what connection that might be to the pay table. Also, provide a description on how you determine minimums and maximums on the pay table..... 11
 - e. Estimated time the project will take from beginning to completion date..... 11
- 4. Cost Proposal 13**
- Contractual Considerations 14**

1. Introduction

February 9, 2024

Robin I. Gomez
City Manager
City of Madeira Beach
300 Municipal Drive
Madeira Beach, FL 33708

Dear Ms. Gomez,

We appreciate the opportunity to present this proposal regarding services Gallagher's Human Resources & Compensation Consulting practice (Gallagher) is able to offer the City of Madeira Beach (the City). Gallagher is highly capable and qualified to work with the City based on our extensive experience with Public Sector organizations throughout the country. We would consider it a privilege to serve the City in this capacity.

We understand that the City is seeking proposals from qualified consultants to conduct a comprehensive HR (human resources), classification, and compensation study and analysis. We understand that the City employs full-time and part-time employees in unique job classifications. This study will evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors.

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 new compensation system.

We appreciate the opportunity to submit this proposal and look forward to assisting the City.

Sincerely,



Ronnie Charles, SPHR, GPHR, IPMA-SCP
National Managing Director & Practice Leader
651.234.0848
Ronnie_Charles@ajg.com

5516 Falmouth Street
Richmond, VA 23230



Mr. Erik Smetana, MBA, SPHR, SHRM-SCP
Managing Director & Operations Leader
314.494.4849
Erik_HenrySmetana@ajg.com

8 Cadillac Drive
Brentwood, TN 37027

2. Experience and Qualifications

a. A brief description of the experiences and qualifications.

Human Resource and Compensation Consulting Practice: Gallagher's Human Resources & Compensation Consulting 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. Bringing together experts from compensation, performance, search, 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: *Compensation & Total Rewards, Engagement Solutions, Human Resources Policy & Strategy, Leadership Development & Organizational Strategy, Executive Search, and Data & Research.*

Public Sector Consulting Practice: Gallagher's public sector & higher education consulting practice includes extensive experience in developing and communicating a compensation philosophy, designing and implementing market-aligned pay structures, 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 are in compliance 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 serve clients across an array of strategic and value-adding HR services with **classification and compensation as a core specialty.**

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, 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 field by attaining their Certified Compensation Professional (CCP) certification, and serving as instructors and presenters for WorldatWork, and the PSHRA. Our partners have been featured speakers at PSHRA national conference for more than 25 years. **Our managing directors have 30 years of experience assisting organizations in classification and compensation issues.**



b. Listing and bios of proposed staff member(s) who will be performing the services.

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 public employers, with a significantly diverse employee workforce. 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
- IPMA-SCP from the Public Sector Human Resources Association
- SPHR from the Human Resources Certification Institute
- SHRM-CP from the Society for Human Resource Management
- Master's degree or above, in Human Resources, Business Administration, and/or Organizational Psychology



PROJECT ADVISORS

RONNIE CHARLES, SPHR, GPHR, IPMA-SCP - National Managing Director - 30 years of experience

Ronnie leads Gallagher's public sector Human Resources & Compensation Consulting practice. Ronnie has over 30 years of Public Sector HR experience, including Chief Human Resources Officer (CHRO) experience, most recently in the City of Baltimore, with additional professional stints in the District of Columbia, the State of Virginia, and the City of Suffolk, Virginia. Ronnie has a Bachelor's Degree in Management from Saint Paul's College. Ronnie is a member of several professional organizations, including the International Public Management Association for Human Resources (IPMA-HR), and is a past chair of the International IPMA-HR Professional Development Committee. In addition, Ronnie is a past Chair of the Human Resources Institute (HRCI). He brings vast experience in domestic U.S. and Global HR compensation practices.

ERIK HENRY-SMETANA, MBA, SHRM-SCP, SPHR, Managing Director - 20 years of experience

Erik's 20-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 with the University of Missouri System and Vanderbilt University as the Executive Director of People & Engagement, leading, designing, and implementing compensation and people-focused programs and initiatives.

PROJECT LEADERSHIP SUPPORT

MICHAEL BURTON, Principal Consultant - 20 years' experience

With over two decades of experience in the field of compensation and benefits, he brings a wealth of knowledge and expertise that spans various industries, including utilities, business services, educational institutions, pharmaceuticals, and financial services. His career journey has equipped him with a deep understanding of total rewards strategies, enabling him to design and manage innovative programs that attract, retain, and motivate top talent. Michael has a proven track record of crafting and implementing intricate compensation and benefits programs tailored to meet the unique needs of diverse organizations. Whether it's developing competitive compensation structures, designing executive and variable incentive plans, or managing comprehensive benefits packages, Michael has consistently delivered solutions that align with business goals while ensuring fairness and transparency.

BEVERLY MOULTRIE, SPHR, IMPA-SCP - Principal Consultant - 25 years of experience

Beverly has over 25 years of professional human resources experience in all facets of HR Operations including Talent Acquisition, Compensation, Benefits, Employee & Labor Relations, Diversity Equity & Inclusion, Talent Development and Safety & Health. Beverly also brings a wide range of expertise working with large, mid-sized, and start-up organizations (both public and private) in government, higher education, healthcare, manufacturing, non-profit and service environments. Beverly is particularly adept at managing complex projects and has led the adoption of employee relation strategies and human resource systems where no prior system existed. Her experience also includes a progressive career in HR leadership roles as a Senior HR Leader and Corporate Diversity & Inclusion Manager for Fortune 500 companies. Additionally, Beverly has served as the CHRO for the City of Chattanooga, where she launched the strategic development of the City's equity & inclusion work with the Government Alliance on Race and Equity. Beverly has a master's degree in business with an emphasis on organization development and is a certified senior human resource professional.

LARRY ROBERTSON, Senior Consultant - 26 years of experience

Larry's 27-plus-year work history includes a variety of roles that included 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. He is a 2022 CUPA-HR Distinguished Service Award Recipient.

SHARI FALLON, PHR, SHRM-CP - Senior Consultant - 24 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.

DEREK SMITH, PhD, Senior Consultant - 15 years of experience

Prior to 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 of Science, a Master's of 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), and the Korn Ferry Leadership Architect.

ALLEN JOHANNING, Senior Consultant - 15 years of experience

Allen has nearly 15 years of experience, working in compensation, people analytics, and workforce development and assessment within various healthcare organizations and higher education university systems. Allen began his career focusing on HR Information Systems, Workforce Development, Compensation and Process Improvement in the healthcare industry, working for a large university hospital health system as well as a standalone hospital that was part of one of the state's largest health system. He then transitioned to the University of Missouri System, which is comprised of four Universities and a health system, spread across the state. In his almost 10 years with the University of Missouri System, he held various individual contributor and leadership roles, spending the final 6 years as the Director of Compensation and HR Analytics. Allen received his Bachelor's degree in Business Administration from the University of Missouri-Columbia. He also has previously earned certifications with the Human Resources Certification Institute (Professional in Human Resources) and the Human Capital Institute (Strategic Workforce Planning).

CATHERINE THORP, BBA in Management, Senior Consultant - 10 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.

PROJECT STAFF SUPPORT

CHARMAIN KOHLER, Consultant II - 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.

ERIN KOLECKI, SHRM-CP, Consultant II - 15 years of experience

Erin brings more than 15 years of human resources experience in a variety of roles and industries. Before joining Gallagher, Erin served as a compensation consultant with the Texas Association of School Boards. Erin has a bachelor's of business administration in human resource management from Texas A&M University and is a Society for Human Resources Management Certified Professional (SHRM-CP). In her free time, Erin enjoys running, reading, and spending time with her husband and twin boys, when they are home from college.

TRACY MORRIS, Consultant II - 7 years of experience

Tracy has 7 years of experience working in 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).

**JAIME PARKER, Consultant II - 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 also 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.

CHAU TRAN, Consultant II- 9 years' experience

Chau holds a Bachelor of Arts degree from the University of Utah and brings 9.5 years of experience working in public sector human resources compensation consulting. Chau served as a senior data analyst in compensation consulting at the Texas Association of School Boards where she served community colleges, public schools, charter schools, and educational service centers across the state of Texas.

DEE SMITH, Consultant - 18 years of experience

Dee is an established Human Resources professional that brings 18 years of comprehensive HR experience in several vertical industries in both the private and public sectors. Dee earned a Bachelor of Science degree in Human Resources Management and General Management from the University of Tennessee at Chattanooga and also holds an MBA. Dee is experienced in the areas of operations, recruitment, employee relations and benefits administration.

LUCILLE ZHANG, Consultant - 2 years of experience

Lucille has experience in the areas of compensation, talent management, training, and people analytics. Prior to joining Gallagher, Lucille served as a Compensation Analyst at Novellis, where she provided expertise in the administration and implementation of compensation programs. She also has worked at Willis Towers Watson to support clients across industries on executive compensation. Lucille earned a Bachelor's Degree in Psychology from Lafayette College and a Master's Degree in Industrial and Organizational Psychology from New York University.

PRISCILA CANDAL, MA, Associate Consultant - 8 years of experience

Priscila has experience in employee relations, compensation and classification and talent acquisition. She worked at the City of Gainesville as a Talent Acquisition Representative and at Iowa State University as a Human Resources Generalist, giving her first-hand experience in the public sector and higher education. She also worked for a global agricultural and forestry machinery manufacturer in Germany. Priscila has a Bachelor of Arts in Psychology and a Master of Business Administration in Human Resources. She is located in Gainesville, Florida.

MARY GAUTHE, SHRM-CP, Associate Consultant - 5 years of experience

Mary has 5 years of experience from Louisiana State University, where she's worked within the University's Central HR unit as a Compensation Consultant. Mary has a Bachelor's degree in Management with a concentration in Human Resources from Nicholls State University and is currently set to graduate from Louisiana State University in August with her Master's in Leadership and Human Resource Development.

KEVIN GRANGER, Senior Analyst - 12 years of experience

Kevin received his Bachelor's Degree in Mathematics from Texas Southern University in 2020. Prior to joining this team, Kevin worked at Gallagher as an Associate Account Manager for 2 years. Kevin is a Houston native and loves his city.

AMBER SHANG, MA in I/O Psychology – Associate Consultant - 2 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.

TERESA NGUYEN, MS, Senior Analyst - 2 years of experience

Teresa has a Bachelor's degree in Organizational Psychology from Spalding University and a Master's degree in Industrial Organizational Psychology from Western Kentucky University. Her most recent role was with Louisville Metro Government, as a Compensation & Classification Analyst. Her role focused on job descriptions, job evaluations, reclassifications, market analysis, and compensation projects focused on internal equity.

CARISSA MARTO, MA in I/O Psychology, Senior Analyst - 2 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.

XIAOWEN YANG, BS IN MATHEMATICS, Senior Analyst - 5 years of experience

Xiaowen comes to Gallagher with five years of analytical experience in learning & development, product management, sales operations, and employee & physician engagement. Xiaowen most recently managed the full-cycle employee engagement survey program – encompassing design, development, analysis, reporting, and action planning - at West Monroe.

YUMI ZHU, MA, Senior Analyst - 2 years of experience

Prior to joining Gallagher, Yumi worked at WTW as a compensation analyst and interned at PwC and KPMG China where she gained experience working in consulting. Yumi recently graduated from University of Pennsylvania with a master’s degree in Organizational Dynamics and held a bachelor’s degree in Finance from DePaul University.

JOY PHILLIPS, MA, Analyst - 2 years of experience

Joy has 2 years of experience from Louisiana State University, where she’s worked within the University’s Central HR unit as an HRIS data analyst. Joy has a Master’s degree in Human Resources & Leadership Development from Louisiana State University.

c. A brief description of the organization.

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’ve 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.

Founded in 1927		130+ Countries Served	Global Reach Local Presence Shared values Passion of excellence Promises delivered
860+ Offices Globally		\$9.5B Total Adjusted Brokerage & Risk Management Revenues <i>(As of 9/30/2023)</i>	 <p style="font-size: 8px; margin-top: 10px;">World's Most Ethical Companies™ and "Ethisphere" names and marks are registered trademarks of Ethisphere LLC, Arthur J. Gallagher & Co. has been recognized as one of the World's Most Ethical Companies™ in 2010, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022 and 2023.</p>

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’ve sustained a reputation for ethics and a commitment to transparency that continue

contribute to our growth. In fact, Gallagher was the first insurance broker named to the Ethisphere® Institute’s annual list of the World’s Most Ethical Companies in 2012 — and has earned this recognition for thirteen years, through 2023. This is a tremendous achievement: annually, less than 150 companies based in 24 countries and representing 57 industry categories received this honor. Gallagher is the only insurance broker to have ever been recognized.

The high standards of conduct we’ve 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.



d. A list of cities for which the consultant has conducted the comprehensive classification and compensation studies (within the past five years).

Aiken County Government
Aitkin County
Albemarle County
Atlanta Regional Commission
Atlantic City Municipal Utilities Authority
Barnes County
Barona Band of Mission Indians
Becker County
Benton County
Billings County
Black Hawk County
Blue Ridge Juvenile Detention
BREC
Bremerton Housing Authority
Burleigh County
Campbell County Fire Department
Capitol Region Watershed District
Carver County
Cass County
Champaign County
Champaign-Urbana Mass Transit District
City and Borough of Sitka
City and County of Denver
City and County of Honolulu
City of Allentown
City of Andover
City of Angleton
City of Anoka
City of Artesia
City of Austin
City of Avon Lake
City of Baytown
City of Becker

City of Bellevue
City of Berkley
City of Billings
City of Blaine
City of Bloomington
City of Caldwell
City of Charlottesville
City of Chattanooga
City of Chesapeake
City of Clarksville
City of Cleveland
City of Deer Park
City of Eden Prairie
City of Englewood
City of Farmington
City of Fergus Falls
City of Fort Worth
City of Gillette
City of Grinnell
City of Hampton
City of Hondo
City of Hopkins
City of Idaho Falls
City of Irvine
City of Johnston
City of Katy
City of La Quinta
City of Lexington
City of Manhattan
City of Marshall
City of McMinnville
City of Meridian
City of Miami

City of Midland
City of Minneapolis
City of Minot
City of Mission Hills
City of Missouri City
City of Newton
City of Ottumwa
City of Owatonna
City of Oxnard
City of Oyster Creek
City of Pearland
City of Quincy, MA
City of Rapid City
City of Red Lake Falls
City of Red Wing
City of Roanoke
City of Rocky Mount
City of Roeland Park
City of Ruston
City of Sacramento
City of Shreveport
City of Sioux Falls
City of Spring Valley Village
City of Springfield
City of Stafford
City of Statesville
City of Tacoma
City of Thief River Falls
City of Tolleson
City of Topeka
City of Valley Center
City of Vermilion
City of Wausau

City of Webster
City of West University Place
City of Wolfforth
City of Woodland Park
Clark County
Clay County
Cleveland Bakers & Teamsters Benefit Funds
Clinton County
Colorado Office of the Attorney General
Colorado School Districts Self Insurance Pool
Comfort Lake Forest Lake Watershed District
County of Allegan
County of Greenville
Currituck County
Denver Housing Authority
Dona Ana County
Dunn County
El Paso Police & Fire Pension Fund
Emanuel County
Fargo-Moorhead Metro Flood Diversion Authority
Fauquier County
Franklin County
Greater Lafayette Public Transportation Corporation
Guardian ad Litem Board
Gunnison County
Henrico County
Ho-Chunk Nation
Housing Authority of the City of Pittsburgh
Houston County
Illinois Housing Development Agency
Intercity Transit
Kandiyohi County
Ketchikan Gateway Borough
King County
Kitsap Transit
Kodiak Island Borough
La Plata County
Lake County Forest Preserves
Lake County Government
Lake County
Lane County
Las Vegas Metropolitan Police Department

Le Sueur County
Little Rock Convention & Visitors Bureau
Lorain Metropolitan Housing Authority
Los Alamos County
Louisville Metro Housing Authority
Macon County, North Carolina
Maine State Housing Authority
MassHousing
McHenry County
McKenzie County
McLean County
Michigan Works! Southeast
Montgomery County Common Pleas Court
Montgomery County
Mower County
Nebraska Judicial Branch
Nicollet County
North Dakota Association of Counties
North Kansas City
Northeast Ohio Regional Sewer District
Oakland Housing Authority
Ohio Public Employees Retirement System
Orange County
Otter Tail County
Pennington County
Pennsylvania Patient Safety Authority
Pennsylvania's State System of Higher Education
Pipestone County
Port of Houston Authority
Port of Moses Lake
Port of San Diego
Prince William County Department of Fire & Rescue
Prince William County
Prior Lake Spring Lake Watershed District
Public Utility District #1 of Okanogan County
Pueblo County
Ramsey County
Ramsey County
Regional Transportation District
Rhode Island Airport Corporation
Rice Creek Watershed District
Richland County

Roanoke County
San Antonio Housing Authority
Sargent County
Sheboygan County
Sherburne County
Skagit County
South Dakota Unified Judicial System
South Washington Watershed District
St. Cloud Metropolitan Transit Commission
St. Paul Public Housing Agency
St. Tammany Fire Protection District #4
St. Tammany Parish Library
State of Colorado Division of Human Resources
State of North Dakota Department of Health/Human Services
State of South Dakota
State of Utah
Steele County
Summit County
Summit County
Tacoma-Pierce County Health Department
The Virginia Department of Social Services
Todd County
Town of Colonial Beach
Trail County
Upper Mississippi River Basin Association
Vadnais Lake Area Water Management Organization
Village of Schaumburg
Virgin Islands Public Officials Compensation Commission
Virginia Department of Health Professions
Virginia Department of Housing & Community Development
Virginia Department of Labor & Industry
Virginia Department of Taxation
Virginia Department of Veterans Services
Virginia Housing
Virginia State Police
Ward County
Washington Cities Insurance Authority
Washington State Association of Counties
Western Lake Superior Sanitary District
Whatcom County

e. A list of three recent client references, including telephone numbers, email addresses, and addresses.

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 SACRAMENTO, CA | 915 I Street Sacramento, CA 95814

Shelley Banks-Robinson, Director of Human Resources, 916.808.554, SMBanks-Robinson@cityofsacramento.org

We worked with the City on a classification and compensation study that resulted in updating all the classification specifications, collecting market data on over 200 benchmark jobs, and salary structure recommendations.

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 several more compensation projects.

HENRICO COUNTY, VA | 4301 East Parham Road, Henrico, Virginia 23228

Yvette George, Human Resources Director, 804.501.7202, geo029@henrico.us

We recently completed a compensation project encompassing 11,250 general government, public safety, and public school employees in 779 job classifications

3. Approach/Methods Used to perform the Project

a. Proposer's understanding of the services to be provided.

We understand that the services to be provided are as follow:

- Review and evaluate Human Resources/Personnel processes relative to all City job classifications and compensation.
- Review and evaluate all current job classifications to ensure compliance with federal, state, and local laws and regulations including the Fair Labor Standards Act, exempt/non-exempt classifications, and all other applicable personnel provisions.
- Review all current job classifications, confirm, and recommend changes to hierarchical order of jobs using your evaluation system.
- Establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers).
- Identify potential pay compression issues and provide potential solutions.
- Analyze and recommend changes to the present compensation matrix and/or structure to meet the market analysis. This recommendation may include recommendations for individual positions as well.

b. Complete methodology to be used in determining benchmark positions, other cities and counties to include in the survey, and determining salary ranges.

Following industry standards and best practices, a customized survey process will be undertaken to collect market pay comparison information related to all the City classifications. Gallagher and the City will work together to develop the listing of comparable organizations to survey as well as the list of benchmark jobs to be surveyed. Private sector information, if desired by the City, can be collected using valid and credible published survey sources and the data integrated with the customized survey data to arrive at the market information.



We follow professionally accepted compensation principles and practices as outlined by WorlDatWork, SHRM, and the Department of Labor. Some of these guidelines are listed below. We have also authored many articles on various aspects of conducting salary surveys; please refer to our website www.ajg.com/compensation for these specific articles. We utilize the following guidelines for benchmark selection:

- Representation of all job families and levels throughout the organization
- Highly populated jobs
- Jobs found in most organizations
- Jobs with recruitment or retention problems

We will review job descriptions and other job documentation to ensure we understand the duties and responsibilities, level in which the job is functioning, and the reporting relationships so that participating organizations can match their classifications to the benchmark jobs. We will draw on our 30 years of salary and benefits survey experience to determine if a comparable job can be found in the labor market. We will ask the City to clarify any questionable jobs and/or answer any questions we may have about a particular job.

We follow guidelines for job matching (match only those jobs that match at least 80% of the duties, responsibilities and functions as outlined in the benchmark job summary). While some firms may claim to use a higher percentage, we believe anything over 80% may exclude data that are good, valid matches. We do not ask participants to rate the quality of the match, as this introduces additional subjectivity to the process that cannot be controlled. We follow professionally accepted guidelines for defining labor markets and selecting organizations to survey. We factor in that different jobs will have different recruiting markets, by:

- Type of organization (e.g. Public vs. Private sector)
- Size of organization
- Geographic location
- Services provided

It is important to define an organization's labor market prior to the survey rather than after the data have been collected so that it does not appear that the labor market data are being manipulated to support a certain conclusion. This could cause significant issues from an employee perception standpoint as well as potentially violate Federal Trade Commission and the U.S. Department of Labor's Sherman Antitrust Act guidelines in regard to the analysis of salary data. Any published sources utilized must meet the following criteria:

- Be conducted by a reputable salary survey firm
- Survey data is not self-reported
- Survey is conducted on a continual basis instead of a one-time event
- Survey reports its data sources, the effective date of the data, and was tested to ensure accurate matches and data

We will develop a data collection form that poses questions in a fashion that is easy for participants to answer, as well as being easy to quantify and analyze. We follow-up with participants to ensure data quality and validity of matches and data being reported. If there are any questions, we ask question and we seek job descriptions, organizational charts, and other information. We perform several reviews of the data as well as statistical tests to identify any extreme data and to ensure the validity of the data. We utilize trend factors for aging data so that all data is consistent to a current point in time. The trend factors are derived from either the U.S. Department of Labor data or WorlDatWork Surveys.

We apply geographic differentials as appropriate and necessary to ensure that the data are reflective of the City's labor market and economic conditions. We use third party resources (ERI) to identify the appropriate geographic differences. We calculate various statistics for summarizing the data (means, medians, highs, lows, percentiles). We follow the Federal Trade Commission and the U.S. Department of Labor guidelines that 5 matches should exist per job in order to draw reliable conclusions. Therefore, we do not calculate statistics (means, medians, etc.) on jobs with fewer than 5 job matches.

The City would like the development of salary structure options so that compensation is equitable and competitive. In order to develop a reliable salary structure, we integrate market data and custom survey results with the internal equity ratings from job evaluation if applicable, so that the structure is internally equitable and externally competitive. In this step, we assign all jobs to the right pay grade and all employees to the right place in the range based on agreed upon criteria. During this phase, we also discuss how pay

progression is integrated in a sustainable system that grows with the City and allows for employee development and contribution to goal achievement. We will also review the resulting structure for pay compression and pay equity issues. Up to three implementation scenarios will be provided to the City. Gallagher will review and update the City’s current policies and procedures related to classification and compensation.

c. Description of the system you utilize to determine internal equity.

Job Description Review: We will review existing job documentation for consistency in format and accuracy in job functions. We will use the current job descriptions provided by Organization to review and revise the current classification structure. If there are concerns or questions on the descriptions, we will follow-up with discussions with Human Resources, management, or employees to ensure our understanding of the job responsibilities. Through this work we will ensure appropriate job matches and internal alignment in the potential salary structures. Additionally, we can make recommendations on job description content to ensure compliance with applicable laws and regulations.

Internal Equity: We will work with Organization to evaluate each job title with the current job evaluation methodology to determine internal equity. Our project plan and cost reflect reviewing all Organization job titles and ensuring internal consistency and accuracy of job functions. We have significant experience in applying job evaluation methods, but will work with Organization to ensure our understanding of the method and the jobs. In many cases, we will verify the current evaluations of Organization and ask follow-up questions to clarify any questions

d. Description/philosophy in determining market rates and how that relates to individual classification and what connection that might be to the pay table. Also, provide a description on how you determine minimums and maximums on the pay table.

Market Comparison: We will work with Organization to identify benchmark job classes for the purposes of competitive market analysis. We recommend that Organization collect market data on its job titles to ensure sufficient data and validity of the resulting salary structure. We will survey both current rates of pay, minimum and maximum rates of pay, in addition to the relevant benefits and the employer and employee cost. We will also integrate private sector salary information in the market comparison process from survey sources that represent the local area market.

Salary Structure Development & Implementation Analysis: To develop a reliable salary structure, we integrate market data and custom survey results with the internal equity ratings from job evaluation, so that the structure is internally equitable and externally competitive. In this step, we assign all jobs to the right pay grade and all employees to the right place in the range based on agreed upon criteria. During this phase, we also discuss how pay progression is integrated in a sustainable system that grows with Organization and allows for employee development and contribution to goal achievement. Up to three implementation scenarios will be provided to Organization. These resulting pay structures and implementation scenarios will be reviewed to ensure a gender and race neutral system.

e. Estimated time the project will take from beginning to completion date.

Our practice takes a thoughtful and collaborative approach to all of 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 significant 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 is our detailed work plan and the estimated project timeline.



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: STUDY ADMINISTRATION

Meeting via telephone/online platform to initiate project and discuss timelines and key deliverables.
 Organization & salary material collected.
 Discussion/review of the strengths and weaknesses of the City’s current classification system. Discussion of the City’s current philosophy and supporting strategies.
 Project timetable confirmed.
 Employee orientation sessions conducted.
Virtual Meetings are included. On-site visits are available at an additional charge to the City.

PHASE 2: CLASSIFICATION & COMPENSATION STUDY

Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.

CLASSIFICATION STUDY

Review of and analysis of job descriptions/documentation for all employees covered by the study.
 Conduct interviews with managers/supervisors (and with individual employees, as necessary) to verify/clarify job information.
 Analysis of existing classifications and recommendations on any changes to current classification plan.
 Review exempt and non-exempt classifications to ensure proper Fair Labor Standards Act (FLSA) status.
 Recommendation of standard classification and titling conventions.
 If applicable, allocate employees to an appropriate job class in the new classification structure.
 Conduct a complete diagnostic review of current the City’s practices to identify areas of concern.

COMPENSATION STUDY

CUSTOM SURVEY

Labor market confirmed and survey participants identified to gather data from local, state and regional sources.
 Benchmark jobs identified and summarized (includes one [1] round of client revision).
 Benefit and pay practice questions determined for inclusion in the custom survey. Custom survey developed and conducted (includes two [2] rounds of client revision).

INTEGRATE PUBLISHED SURVEY SOURCES

Identify appropriate published survey sources.
 Collect market data from published survey sources using data cuts from public, private, local, state and regional sources.
The following activities will be performed on all data:
 Comprehensive internal salary relationship analysis of data to ensure the structure is internally equitable and externally competitive.
 Competitive analysis of market data (salary, benefits, and contracts) performed.
 Diagnostic review of current salary structures conducted to identify opportunities for simplification, reduction in pay compression.
 Recommended pay structure developed or existing structures updated (includes 1 revision requested).
 Internal review conducted and consolidated feedback provided by the City. The City approves the updates to the pay plan(s) and other recommendations and implementation options.
 Provide the City with up to three (3) transition options, recommendations and next steps/ongoing maintenance (includes one round of client revision).

PHASE 3: PROJECT FINALIZATION, DRAFT & FINAL REPORTS

- Consultant shall make presentations to the HR/leadership prior to completion and at the time of completion, at times and in a manner agreed upon with the City.
- Conduct of meetings with HR/leadership/project team at critical intervals to discuss deliverables.
- Draft and final report and presentations developed and quality assurance reviews conducted.
- Training provided for staff including necessary tools to maintain the system.

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 very 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	PHASE 2	PHASE 3
Month	Study Administration	Classification & Compensation Study	Project Finalization, Draft & Final Reports
1			
2			
3			
4			
5			
6			
7			

4. Cost Proposal

Our fees to conduct the study outlined above (including out-of-pocket expenses) will be \$54,650 - \$ 79,650. The table below outlines the price per phase.

Phase	Fee
PHASE 1: Study Administration * <i>Includes virtual meeting and ongoing project management meetings throughout.</i> <i>Additional on-site meetings are available at an additional cost*</i>	\$3,500
PHASE 2: Classification & Compensation Study**	\$32,650 <i>Job Description Drafting: \$25,000</i>
PHASE 3: Project Finalization, Draft & Final Reports <i>Additional on-site meetings are available at an additional cost*</i>	\$3,500
Pre-Panned Travel & Expenses	\$15,000
TOTAL COST: \$54,650 - \$ 79,650	

*Additional on-site meetings are available at an additional cost.

**Should the City request Gallagher to update/write job descriptions, beyond what is described above, those services will be priced separately since we are unable to determine the number that will be required. Pricing would be \$550 per job description and is in addition to the “Total Cost” identified above.

Our study costs are directly derived from estimating the number of hours needed to perform the work and the level of the consultant charged with performing the work. Gallagher typically bills on a monthly basis up to the maximum of each deliverable. Please note, as phases sometimes run concurrently, a phase may not be completed at the time it is billed. All expenses are included in this quote. Should the City wish to have additional on-site presentation days or meetings, the estimated cost would be \$5,000 per day. Any change to the scope of the assignment (beyond what is described above) as well as other work requested beyond this assignment will be billed based on our hourly rates, unless we mutually agree on a fixed fee for the additional work.

Contractual Considerations

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.

INDEMNIFICATION AND INSURANCE (PDF page 2) - Indemnification should be limited to grossly negligent acts and omissions, breaches of the contract, intentional misconduct, or violations of law.

INDEMNIFICATION AND INSURANCE (PDF page 2) - 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.

* * * * *

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,



Ronnie Charles, SPHR, GPHR, IPMA-SCP
National Managing Director & Practice Leader
651.234.0848
Ronnie_Charles@ajg.com

5516 Falmouth Street
Richmond, VA 23230



Mr. Erik Smetana, MBA, SPHR, SHRM-SCP
Managing Director & Operations Leader
314.494.4849
Erik_HenrySmetana@ajg.com

8 Cadillac Drive
Brentwood, TN 37027

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Ronnie Charles, National Managing Director & Practice Leader

[print individual's name and title]

Gallagher Benefit Services, Inc. for

[print name of entity submitting sworn statement]

whose business address is: 2850 Golf Rd, Rolling Meadows, IL 60008 and (if applicable) its Federal Employer Identification Number (FEIN) is 36-4291971 (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
- (iv) the penalties that may be imposed upon employees for drug abuse violations.

City of Madeira Beach

RFP 24-01

- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
- (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president.

In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: *Ronnie Charles*
Title: National Managing Director & Practice Leader
Company: Gallagher Benefit Services, Inc.

NOTARY PUBLIC

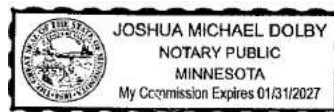
Minnesota
STATE OF ~~FLORIDA~~
CITY OF Hennepin

Sworn to and subscribed before me this day of February 8, 2024, 2024.

by Ronnie Charles who

is personally known to me OR Produced identification
_____ [type of

identification] My commission expires 1/31/2027



Notary Public Signature *Joshua Dolby*
[Print, type or stamp Commissioned name of Notary Public]

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent	Title
<u><i>Ronnie Charles</i></u>	National Managing Director & Practice Leader
Printed Name	Date
<u>Ronnie Charles</u>	<u>2/8/2024</u>



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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.





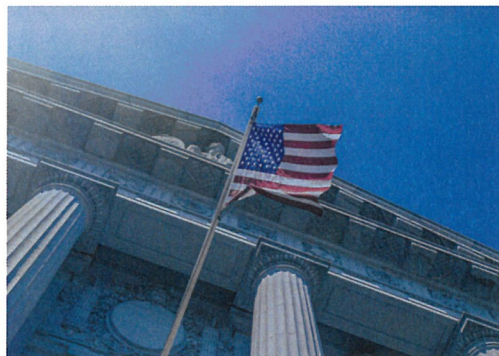
CITY OF MADEIRA BEACH

HR, CLASSIFICATION & COMPENSATION PLANS STUDY
RFP NO. 2024-01

Due Date: Friday, February 9, 2024 at 3:00 p.m.

Proposal Contact: Cindy Thompson, V.P. of Operations
Tel: (800) 244-3696 or (561) 626-6797 | **Fax:** (561) 626-6970
Contact Email: cindy.thompson@gehringgroup.com
Address: 3500 Kyoto Gardens Dr., Palm Beach Gardens, FL 33410
Binding Authority: Kurt N. Gehring, Managing Director

Supporting the public sector our communities rely on.



February 7, 2024

City of Madeira Beach
Attn.: Robin I. Gomez
300 Municipal Drive
Maderia Beach, FL 33708

Re: RFP #24-01 HR, Classification, and Compensation Plans Study

Dear Evaluation Committee Member:

Gehring Group, a Risk Strategies Company (Tax ID: 16-1689464), is pleased to provide this proposal in response to the City of Madeira Beach's RFP #24-01 for HR, Classification, and Compensation Study Plans. Through our extensive experience over the past 30 years serving as public sector consultant/broker for over 130 Florida public sector entities, we are confident that our firm will offer hands-on public sector experience, and an unparalleled service standard with our ongoing goal of not merely meeting the City of Madeira Beach's needs but exceeding its expectations.

Gehring Group has grown to become one of the most respected employee benefits, risk management, and human capital consulting agencies in Florida. As in typical Gehring Group fashion, every service we offer has been inspired by client feedback. Our team at Gehring Group averages over 15 years of industry experience, and our Human Capital consulting team has more than 50 years of experience in human resources leadership and consulting experience with an emphasis in the public sector, working with various full-service towns and cities throughout Florida. Upon becoming a division of RSC Insurance Brokerage, Inc. (d/b/a Risk Strategies Company) on January 1, 2022, Gehring Group now has even more to offer. RSC has over 5,000 valued team members, in-house legal, human capital management, data analytics, and other consulting resources available. We are industry leaders, ranking in the top three in the country in various specialties and have a robust offering in human resources consulting, employee benefits and property and casualty broker services.

As part of the Risk Strategies family, Gehring Group continues our public sector focus, currently serving over 130 public sector clients in Florida, including county and municipal governments, special taxing districts, county constitutional offices, aviation authorities, colleges, public utilities, and school boards. Additionally, our team works with entities near the City of Madeira Beach such as Pinellas County Sheriff, Pinellas County Transit Authority, Pinellas County Housing Authority, Clearwater, Dunedin, and Treasure Island, which provides us with the advantage of knowing the local market and the challenges of hiring and retaining talent both in the local area and other agencies throughout the state of Florida. Gehring Group is unique in our qualifications to be your consultant for the compensation study for several notable reasons:

1. **Public sector is our only industry specialty** which will allow the City to leverage our extensive knowledge and understanding of your unique needs. Gehring Group's proposed team has extensive prior human capital experience working directly for the public sector at municipal governments, fire districts, sheriff's office, school boards, colleges, and county constitutional levels. Therefore, our team understands your environment and culture.

- 2. **Extensive hands-on knowledge of public sector employment practices.** The team dedicated to this project has conducted comprehensive job classification, compensation, and benefits studies as human resources professionals working directly for public sector entities. This includes FLSA wage and hour position compliance, developing job descriptions and career pathing, gender equity audits and policy development relating to hiring, promotions, demotions, transfers etc. The team also has extensive experience in administering all aspects of total rewards programs, including compensation, employee benefits and wellness.
- 3. **Consulting Software Tools** for job analysis, compensation data gathering, and a proprietary system for benefit comparisons, which allows the Gehring Group to provide creative solutions within our final products.

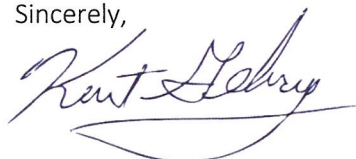
Gehring Group, a Risk Strategies Company, will ensure that the final proposal aligns with The City of Madeira Beach’s philosophy regarding equitable pay, is compliant, continues to attract applicants to join the organization, and motivates and rewards employees to continue their employment by being competitive in the market. Due to our public sector expertise, we realize that a “one-size-fits-all” strategy regarding compensation and benefits does not work. Our human capital consulting team understands the uniqueness of the public sector as it has worked directly for public sector employers prior to joining the Gehring Group. The team has hands-on experience and knowledge of operations and staffing including cities, counties, police and fire, county constitutional environments, colleges, and school boards. We have a comprehensive understanding of compensation and benefits best practices utilized to recruit and retain talent. This gives us the ability to provide multiple solutions and cost options. **The Proposer hereby acknowledges receipt of Addendum #1 to the RFP dated January 29, 2024.**

The individual that is authorized to bind the Proposer is Kurt Gehring, Managing Director, who is located at Proposer’s local office, 3500 Kyoto Gardens Drive, Palm Beach Gardens, FL 33410, and whose telephone number is (561) 626-6797 | (800) 244-3696. Mr. Gehring can also be reached via email at the email address below.

Proposal Contact:	Cindy Thompson, VP - Operations	cindy.thompson@gehringgroup.com
Project Manager:	John Muller, Director of Growth	john.muller@gehringgroup.com
Executive Staff:	Kurt Gehring, Managing Director	kurt.gehring@gehringgroup.com

In summary, Gehring Group makes a positive commitment to perform the services outlined in the City of Madeira Beach’s RFP. Gehring Group’s approach to the business, coupled with our extensive public sector experience, familiarity with applicable regulations, relevant market relationships, and enthusiasm make us the consultant of choice. We thank the members of the selection committee in advance for the review of our comprehensive response and stand ready to provide any additional clarification upon review of this proposal’s contents.

Sincerely,



Kurt N. Gehring, Managing Director & National Practice Leader – Public Entities
Gehring Group, a Risk Strategies Company

Table of Contents

Tab 1: Experience, Qualifications, & References.....5

Tab 2: Approach/Methods Used to Perform Project 11

Tab 3: Cost Proposal 14

Tab 4: Drug Free Workplace Certification 15

Tab 1: Experience, Qualifications, & References

- a. A brief description of the experiences and qualifications.
- b. Listing and bios of professional staff member(s) who will be performing the services.
- c. A brief description of the organization.
- d. A list of cities for which the consultant has conducted the comprehensive classification and compensation studies (within the past five years).
- e. A list of three recent client references, including telephone numbers, email addresses, and addresses.

About Gehring Group, A Risk Strategies Company

Gehring's Human Capital consulting practice is made up of public sector HR leaders that have worked for over 50 years with and for Florida public sector organizations. The Team has vast knowledge and experience in many areas including but not limited to:

- Classification and compensation programs
- Benefits Analysis
- Job Description redesign, including all legally required aspects of all job descriptions
- Recruitment and Retention
- Career path development and implementation
- Benchmarking surveys and research
- Policy Development and Implementation
- Total Reward Strategy
- Organizational performance and design
- Performance management and incentive compensation

In addition, members of the proposed service team have experience working extensively on compensation, classification, and benefits analysis projects of public entities including city and county governments, special taxing districts, county constitutional offices, aviation authorities, public utilities, colleges, and school boards. We have the knowledge necessary to recruit and retain employees in the public sector by creating plans that attract the right talent, and we can address the specific challenges faced by public institutions. We collaborate with our clients to fully understand their needs and align our services to meet the scope of each project.

Detailed below we have included the specific relevant experience of the team in direct relation to understanding and analyzing compensation and classification programs for public sector positions as well as bargaining units and management positions. The following includes examples of specific positions that the Gehring Group team have extensive knowledge:

- Management Level Positions Specific to City/County Operations
- Supervisor/ Manager/Department Director at all levels
- Administrative positions at all levels
- Professional office positions such as IT, Human Resources, Risk Management, Finance & Accounting
- Marketing, Public information, and Events positions
- Purchasing/Buyers
- Storekeepers/Inventory/Asset Technicians
- Parks & Grounds Maintenance positions, including Cemetery Operations

- Fleet Maintenance
- Engineers
- Electronics Technician
- Law Enforcement (Sworn) officers/Detention Deputies
- Non-Sworn public safety positions
- Utility Service Workers/ Plant Operators
- Building Officials/ Code Enforcement/Permitting and Field Inspection Representatives
- Equipment Operators, including Solid Waste & Streets

We are confident that our team members’ experience working for public sector agencies over the past 50+ years will certainly prove advantageous to The City of Madeira Beach.

Public Sector Experience

Gehring Group Public Sector Clients	
Apopka, City of	Marco Island, City of
Atlantis, City of	Margate, City of
Boca Raton, City of	Martin County BOCC
Boca Raton Housing Authority	Martin County School District
Boynton Beach, City of	Martin County Sheriff’s Office
Brooksville, City of	Monroe County BOCC
Broward College	Naples, City of
Cape Coral, City of	North Palm Beach, Village of
Cape Coral Professional Firefighters HIT	North Port, City of
Career Source Palm Beach County	North River Fire District
Charlotte County BOCC	Oakland Park, City of
Children’s Services Council of Palm Beach County	Ocean Ridge, Town of
Citrus County BOCC	Okaloosa County BOCC
Clearwater, City of	Oldsmar, City of
Clerk & Comptroller, Palm Beach County	Orange County Tax Collector
Cocoa, City of	Osceola County Sheriff’s Office
Cocoa Beach, City of	Oviedo, City of
Coconut Creek, City of	Pahokee, City of
Cooper City, City of	Pahokee Housing Authority
Coral Gables, City of	Palm Bay, City of
Coral Springs, City of	Palm Beach County Sheriff’s Office
Dania Beach, City of	Palm Beach, Town of
Davie, Town of	Palm Beach Shores, Town of
Deerfield Beach, City of	Palm Harbor Fire Rescue District
Delray Beach, City of	Palm Springs, Village of
Delray Beach Housing Authority	Parkland, City of
Dunedin, City of	Pasco County Clerk of Circuit Court & Controller
Estero Fire & Rescue District	Pasco County Sheriff’s Office
Estero, Village of	Pinellas County Housing Authority
Fellsmere, City of	Pinellas County Sheriff’s Office
Flagler County Sheriff’s Office	Pinellas Suncoast Fire and Rescue
Florida Keys Aqueduct Authority	Pinellas Suncoast Transit Authority

Gehring Group Public Sector Clients	
Florida PACE Funding Agency	Pompano Beach, City of
Florida Sheriff's Association	Port of Palm Beach
Fort Lauderdale, City of	Port St. Lucie, City of
Fort Myers, City of	Riviera Beach, City of
Fort Myers Beach Fire Control District	Rockledge, City of
Greenacres, City of	Royal Palm Beach, Village of
Gulfstream, Town of	Sanibel, City of
Hernando County BOCC	Sarasota County Sheriff's Office
Hernando County School District	Satellite Beach, City of
Highlands County BOCC	Seacoast Utility Authority
Hillsborough County Aviation Authority	Sebastian, City of
Hillsborough County Sheriff's Office	Sebring, City of
Hollywood, City of	Solid Waste Authority of Palm Beach County
Indian Trail Improvement District	South Florida Water Management District
Iona McGregor Fire District	Southern Manatee Fire Rescue District
Islamorada, Village of Islands	Southwest Ranches, Town of
Juno Beach, Town of	Spring Creek Charter School
Jupiter Island, Town of	St. Lucie County Sheriff's Office
Key West Housing Authority	St. Lucie County Fire District Employees HIT
Key West, City of	Stuart, City of
Keys Energy Services	Tampa Bay Water Authority
Lake Park, Town of	Tarpon Springs, City of
Lake Park Community Redevelopment Agency	Tax Collector, Palm Beach County
Lake Worth Beach, City of	Tax Collector, St. Lucie County
Lake Worth Drainage District	Tequesta, Village of
LWB Community Redevelopment Authority	Government of the US Virgin Islands
Lee County Sheriff's Office	Venice, City of
Loxahatchee Groves, Town of	Virgin Islands Water and Power Authority
Loxahatchee River District	Walton County BOCC
Manalapan, Town of	Walton County Sheriff's Office
Mangonia Park, Town of	Wellington, Village of
Marianna, City of	West Manatee Fire Rescue District
Marco Island, City of	West Palm Beach, City of

We also invite you to review our client video testimonials which can be accessed by clicking on or scanning the QR code to the right. Below are the bios of the team members that will be specifically assigned to this project if awarded:



Project Manager

John Muller, SPHR, SHRM-SCP – Director of Growth

Education: University of Miami, Florida Atlantic University

Degree: B.B.A. Business Management/Organizational Development, M.B.A. International Business

Additional Certifications: SPHR, SHRM-CP

Industry Tenure: 20+ years

Experience & Qualifications

John Muller is a Human Resources leader with over 20 years of experience. As Director of Growth for Gehring Group, a division of Risk Strategies, John leads Gehring's human resources services practice.

Having worked in public sector HR at the Federal and local levels, John has a strong background both in Talent Acquisition and Retention as well as in performing the developmental work needed to improve HR programs and personnel policies, including staffing analysis, job classification, and compensations studies with Federal and local government entities. While with U.S. Department of State, he was charged with assessing staffing plans and hiring professionals in diplomatic services, IT, Education, finance, and other key civilian advisory roles to work in Afghanistan and Iraq. He was highly successful in accomplishing the goals set for this difficult task and then identified as a strong HR leader to support the US Embassy Baghdad's mission in Iraq. John volunteered to serve in Iraq for the period of one year introducing important and valued improvements to the office of Human Resources at US Embassy Baghdad. John has also worked on job classification and compensation studies with local government entities.

John earned a Bachelor's in Business Administration majoring in Business Management and Organizational Development from the University of Miami and a MBA from Florida Atlantic University. He holds his SPHR and SHRM-SCP as well as becoming a certified Predictive Index Analyst. John is also an active member of SHRM, and its local Chapter (PBC SHRM) as a member of the Board of Directors, as well as serving as Chair of the Council of Insurance Agents and Brokers (CIAB) HR working group as well as a graduate and lifetime member of Leadership Florida (Class XL).

Public Sector Experience

John's extensive experience includes HR leadership, talent acquisition, total rewards, training & development, and HR consulting services for such large public sector employers as the U.S. Department of State, Palm Beach County Clerk & Comptroller, City of Palm Bay, City of Cocoa Beach, Sarasota County Sheriff's Office, Martin County School District, Martin County Board of County Commissioners, Keys Energy, Hillsborough County Aviation Authority, and St. Lucie Fire Rescue District.

Lead/Local Consultant

Janet Bodner, MPA – Senior HR & Risk Services Consultant

Education: Syracuse University

Degree: M.S. Public Administration

Industry Experience: 20+ years

Experience & Qualifications

Janet Bodner is an experienced leader and consultant with over 25 years of experience in Human Resources and Operations. As a Senior HR Consultant, Janet lends her vast experience to helping Government entities develop competitive compensation structures, innovative talent development strategies, and training programs that retain top talent.

Janet is a results-focused leader who delivers motivational solutions that help organizations to harness the full power of their most valuable assets-their people. She is dedicated to creating robust organizational solutions that promote continuous business growth and cultivate customer loyalty by empowering and motivating organizations to implement fair and competitive compensation structures, participatory training, and development programs, restructuring of personnel policies and procedures that meet both legal requirements and are reflective of the specific needs of the organization.

Prior to beginning her HR career, Janet served as an Executive Director for several not-for-profit organizations. During that time, she was awarded several grants that allowed the Booker T. Washington Community Center to continue providing various after school programs for children from low-income families. Janet then led HR and Benefits teams for counseling centers and hospices before joining the Manatee County Government, where she has held roles ranging from Finance to HR.

Janet has a bachelor’s degree in political science from Wells College in Aurora, New York. Upon completion of her undergraduate degree Janet pursued and earned a Master’s in Public Administration (MPA) from the Maxwell School of Public Administration and Citizenship at Syracuse University. While earning her master’s degree Janet was selected to intern under Supreme Court Justice Ruth Bader Ginsburg.

Public Sector Experience

Janet joined Manatee County as a Senior Fiscal Manager. From that position she was promoted to manage the County’s Health Benefits for a population of over 4000. For over 13 years, Janet has served the people of Manatee County. She has a robust background in the public sector total rewards (compensation & benefits) strategy focused on attracting and retaining top talent. Janet’s finance and operations leadership skills were used across other HR disciplines and departments within the Manatee County government.

References

Provided below is a list of three (3) recent client references:

Client Name:	Hillsborough County Aviation Authority
Address:	4160 George J. Bean Parkway, Ste 2400, Tampa, FL 33607
Contact Name:	Nancy Duggan, Director of Human Resources
Telephone:	(727) 348-1618
Email:	nduggan@tampaairport.com
Description of Services:	In addition to our full scope of benefits services, the Aviation Authority contracted with the Gehring Group to implement a compensation study. Our team reviewed market data compiled by Aviation Authority staff for internal and external equity within pay bands. Based on the market survey data we conducted a compression analysis and provided cost options for implementation. A review of the job descriptions was also conducted. Gehring Group staff met with each Department to review the results of the study. Once this was completed and adjustments were made, our team created a communication plan and conducted onsite meetings with employees. After the review, adjustments were made, and our team created a communication plan and conducted an onsite meeting with employees to advise and provide education. In addition to this project, we developed a policy of best practices for pay inclusive of new hires, promotions, demotions, transfers, specialty pay etc.

Client Name: **City of Coral Springs**
Address: 9500 W. Sample Road, Coral Springs, FL 33065
Contact Name: Kathy Reul, Director of Human Resources
Telephone: (954) 344-1167
Email: kreul@coralsprings.gov
Description of Services: Gehring Group was contracted to provide a compensation analysis for the City of Coral Springs. Our team was asked to identify comparable peer agencies and conduct a market analysis for each of the City's 300 plus job classifications and benchmark them at the 75th percentile. Upon completion of the analysis, we develop^{ed} a new pay plan for the City as well as re-classifying several positions. After reviewing with City HR staff, Gehring Group conducted a compression analysis for all classifications and employees in each classification. This information was reviewed, with an estimated cost proposal, with the City Manager. The City Manager accepted Gehring Group's recommendation, and after a final review with HR, Gehring Group presented the final pay plan to the City during meeting with City Leadership.

Client Name: **City of Apopka**
Address: 120 E Main Street, Apopka, FL 32703
Contact Name: Joseph Patton, Ph.D., Director of Human Resources
Telephone: (407) 703-1803
Email: jpatton@apopka.net
Description of Services: Gehring Group contracted with the City of Apopka to conduct a class and compensation study for over 170 classifications, to include reviewing and updating the City's job descriptions; and conducting a benefits comparison study with peer agencies. Our team is working with the City to finalize the data collected using our Job Analysis Tool. We expect to finish updating job descriptions before finalizing the compensations analysis.

Tab 2: Approach/Methods Used to Perform Project

Detailed description of the services and methods by which the work set forth in the RFP will be performed. The description shall include the following items.

a. Proposer's understanding of the services to be provided.

Per the City of Madeira Beach's RFP #2024-01 for HR, Classification, and Compensation Plans Study, Gehring Group understands the scope of services to include, but not be limited to, the following:

Project Approach

The team will take a unique and systematic approach to accomplish this project for total review of current compensation and classification for all employee groups. The project team's previous public sector experience afforded them the opportunity to conduct internal compensation and classification studies and the ability to understand the client perspective of outsourcing a compensation study for their entire organization. Our team puts the client's experience first to ensure that we not only provide thorough and detailed information based on the scope of the project, but also an interactive partnership with the City of Maderia Beach providing meaningful updates, flexibility, and comprehensive information that is clear and concise.

This approach includes gathering background information from City staff, determining sources for the market data, analyzing the data, developing alternative proposals with cost calculations, recommendations on how to implement the proposals, and implementation training. Gehring Group will ensure that recommendations assist with achieving the City's objectives.

To create a well-designed classification and compensation program, the Gehring Group team will meet with City staff to ensure our understanding of the current objectives and strategic plan initiatives as they relate to compensation. The team uses a multiple step approach starting with in-person meetings, data gathering, job classification review, market research, analysis and finally drafting multiple recommendations for consideration. Additionally, the team will provide monthly progress updates during the project which allows for transparency, flexibility, and the ability to address concerns and feedback from the City. Details for each of these steps are listed below:

Step 1 – Project Planning - Week 1

1

- Gehring Group team to schedule a discovery meeting with City staff to discuss scope of project, milestones and deliverables
- Discuss City's business goals, objectives and organizational needs
- Discuss City's budget available for suggested adjustment for the compensation and classification study
- Discuss and review peer agencies used in the study
- Review Gehring Group's method of data collection
- Complete an overall assessment of current programs
- Request a list of data to include current employee pay, benefits and demographics
- Discuss communication strategies for project commencement, regular updates and final completion

Step 2 – Review Current Program with Human Resources - Weeks 2 through 3

2

Discuss and collect data on the current pay programs and relevant Human Resources policies for evaluation and review.

- Pay Grades
- Pay Ranges
- Pay Increase History
- Job Descriptions
- Any additional applicable policies

Step 3 – Leadership/Management Discovery - Weeks 4 through 5

3

It is important to gather compensation philosophy input from the leadership/management team through a collaborative process. This will assist with obtaining buy-in from key decision makers.

Meet with leadership and management to discuss current pay and benefits programs' effectiveness

- Pay challenges, strengths, and weaknesses
- Talent pool considerations/obstacles
- Competitors in job market

Step 4 – Employee Input & Job Audits - Ongoing

4

- Employees feedback using Job Analysis Tool
- Employee input meetings (if necessary)

Step 6 – Conduct Market Study – Weeks 6 through 8

5

Finding one data source that meets all your organizations' needs is rare. Therefore, at the Gehring Group, we use multiple sources to ensure the data is accurate.

- Conduct a review of all job classification
- Edit and/or develop new job classifications and descriptions (Option 1)
- Determine which jobs will be used for compensation benchmarking
- Collect total compensation information from comparable agencies and National Compensation Survey data for Local, State, and Federal compiled by the U.S. DOL Bureau of Labor Statistics, including:
 - Salary & wages and benefits
- Benchmark jobs based on essential functions
 - Determine appropriate competitive labor market and data sources(municipal and local)
 - Gather data based on local, regional, national markets
 - Utilize relevant trade and professional association data
- Review positions based on internal and external equity
- Conduct review of benefit plans and benchmark against comparable agencies (Option 2)

Step 7 – Data Analysis – Weeks 9 through 10

6

Based on initial meetings, the Gehring Group will match the City's pay philosophy to the market data.

- Create market comparison spreadsheets
- Compare market data to current pay plan

- Evaluate current employee pay to market data based on compression
 - Identify compression issues and provide possible solutions
 - Consideration may be given for years of service/experience in job
- Review job family data and organizational charts to recommend career ladders
- Properly age data based on implementation timelines

Step 8 – Review Initial Finding with Staff - Week 11

7

Once all the data is gathered it will be reviewed for extreme variables and adjusted appropriately.

- Review market/target data draft proposals with HR and Executive Management
- Provide job descriptions used and review with the City to validate roles and responsibilities for equity
- Define the market position in relation to the base pay
- Clarify any anomalies or outliers
- Make adjustments to pay data as needed

Step 9 – Proposal Pay Plan Design Changes – Week 12

8

Based on market data and internal equity, provide proposals for new/adjusted pay grades and ranges

- Propose consistent recommendations specific to out of pay range incumbents and employees who have reached the maximum of the newly proposed pay grade
- Recommend potential changes to job titling, job descriptions, job families and career ladders
- Conduct compression analysis for all positions based on new pay ranges
- Discuss the potential impact to employee pay for each of the proposals
- Create best practice options and costing proposals for all employee groups and provide
- Provide implementation plan, including procedures, policies, and methods to maintain an on-going Classification and Compensation Plan that is fair and competitive
- Deliver final written report, including discussion of methods, techniques, and data used to develop the Classification and Compensation Plan, and provide estimated financial impact.
- Present the findings and recommendations to City Staff and leadership

Throughout the above steps, the Gehring Group team will meet with City staff to review progress to date and ask any questions relevant at that point. We anticipate this project concluding within 12 weeks of commencement. The timeline can be adjusted based on the City's needs and responsiveness.

Tab 3:

Cost Proposal

This section should contain a complete breakdown of all costs related to the content of the proposal, including the maximized total cost, as well as an itemized breakdown of the compensation required to accomplish the full performance of all tasks outlined in the proposal. Upon selection, it is expected that the consultant will take a minimum of 2 visits to the City. One, to kick off the project to include meetings with staff to discuss issues and a meeting to present findings to the Civil Service Commission, the Board of Commissioners, the City Manager, and select staff.

Cost Proposal

Gehring Group proposes an all-inclusive project fee of **\$27,640** to complete all objectives outlined in this proposal and corresponding RFP for the initial report. This fee includes all work, materials and expenses related to completing the project. Gehring Group will invoice the City of Madeira Beach in equal monthly installments through completion of the project.

Task	Project Manager Hours	Lead Consultant Hours	Total Hours
Discovery Phase	10	30	40
Benchmarking/Data Analysis	10	60	70
Create Proposal/Pay Bands	10	10	20
<u>Final Report</u>	10	10	20
Total Hours	40	110	150
Hourly Rate	\$220	\$144	
Travel			\$3,000
<u>Total Report Fees</u>	\$8,800	\$15,840	\$27,640

Gehring Group also proposes options not included in the scope of this RFP for the following:

1. Comprehensive job description review, revision, and development (if needed) - \$10,000
2. Comprehensive benefits plan review and benchmark study (including reports) - \$10,000
3. Annual compensation benchmark data refresh (of agencies used in this study) - \$10,000 (each year)

Tab 4: Drug Free Workplace Certification

Please see the completed, signed, and notarized Drug Free Workplace Certification Form immediately following this Tab 4.

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Kurt N. Gehring

[print individual's name and title]

Managing Director for RSC Insurance Brokerage, Inc.

[print name of entity submitting sworn statement]

whose business address is: 3500 Kyoto Gardens Drive Palm Beach Gardens, FL 33410 and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: FEIN # 16-1689464

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
- (iv) the penalties that may be imposed upon employees for drug abuse violations.

- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
- (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections
- (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president.

In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: *Kurt Gehring*
Title: Kurt N. Gehring, Managing Director
Company: RSC Insurance Brokerage, Inc.

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF PALM BEACH GARDENS, PALM BEACH COUNTY, FL

Sworn to and subscribed before me this 6th day of February, 2024.

by Kurt N. Gehring who

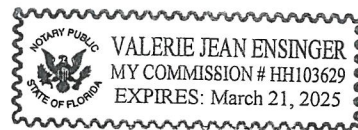
is personally known to me OR Produced identification

personally known [type of

identification] My commission expires March 21, 2025

Valerie Jean Ensinger
Notary Public Signature Valerie Jean Ensinger

[Print, type or stamp Commissioned name of Notary Public]



Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent *Kurt Gehring* Title Managing Director
Printed Name Kurt N. Gehring Date February 6, 2024



HR, Classification, and Compensation Plans Study Maderia Beach, Florida

Paypoint HR, LLC
695 Santa Maria Lane
Davidsonville, MD 21035
(443) 336 - 4272
Karin@PaypointHR.com
Karin VM Campbell

Experience and Qualifications

Paypoint HR, LLC (Consultant) is responding to the city of Maderia Beach's request for proposals from qualified consultants to provide a comprehensive HR, Classification, and Compensation Plans Study. The purpose of the study is to help the city to be recognized as an employer of choice in the area. Paypoint HR will objectively examine the job roles and their placement in the city's hierarchy, the external market's pay ranges for these same positions, and give recommendations for adjustments of the approximately 83 employees engaged across 59 job titles as warranted by the findings. The study recommendations will be substantiated using quantitative evaluations, so that the city of Maderia Beach may make informed decisions with respect to compensation including benefits. Our Florida registration number is M22000000457.

Our understanding of the project is that Maderia Beach is a full-service city that provides both its residents and tourists with a full range of municipal services including but not limited to fire, recreation, public works, and community development. The city desires to update their current compensation plan in order to keep up with current compensation practices. The purpose is to attract and retain a high performing and engaged workforce that will continue providing excellent service to those who live in the city and those that visit the city's attractions.

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.

Resumes

Founded in 2012, Paypoint HR is an independent Limited Liability Company registered in the State of Maryland who provides the public-sector consulting services on a national level. We are a full-service consulting firm with expertise in classification and compensation structure analysis, organizational design, compliance, research analytics, business strategy, and human resources. Ninety five percent of our work experience is in the public sector.



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

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

Mrs. Karin Campbell has led Human Resource initiatives for more than 20 years. She has helped over 700+ employers and 15,000 employees with the development and delivery of customized HR solutions for employee management programs; conducting labor cost analysis of employee administration, benefits, retirement, workers' compensation, federal, state, and local taxes; budgeting for human capital including recruiting, onboarding, benefits, risk management, training, and compliance; and planning, design, and implementation of payroll administration; health, dental, vision, life, and AD&D insurance; and pension, as well as ancillary benefits within a limited timeframe to large workforces.

She has consulted with clients and their employees on complicated employment topics. Her responsibilities also include development and maintenance of compliance and risk management programs. She has taught OSHA compliance as an adjunct professor. Currently she holds SPHR, SHRM-SCP, and IPMA-SCP designations and serves on the Board for the ASHRM chapter. Karin has a strong understanding of current trends in the benefits industry. Karin worked from 1995-2002 for HRLogic, Inc., a wholly owned subsidiary of Fidelity Investments. Most recently Karin owned her own HR firm, Alpine HR, from 2003 until 2012, when she sold her business. In 2012, Karin along with her husband, Rick, formed Paypoint HR, an HR consulting firm which specializes in employee compensation for both private and public-sector concerns. Karin's expertise has been utilized in studies that involve:

- Employee Outreach - She has developed time tested approaches to gaining employee buy in through effective communication and involvement of staff at all levels. She has created formats for briefing sessions, orientations, and focus groups that follow accepted industry protocol and takes into account both the qualitative and quantitative aspects of data collection. Her approach has allowed for better understanding of the nuances within organizations and uses it to formulate recommendations and overcome obstacles that positively impact acceptance.
- Policy Design and Implementation - She has created a process methodology for implementation of classification and compensation recommendations. The flow of the process lends itself to clear transfer of administration and maintenance from plan adoption through to long-term application.
- Communication Plans - She has led successful projects by creating communication plans with the input of each client to recognize project milestones and progress. She has created relationship reporting to ensure projects are completed on time and within budget.
- Business Strategy - She analyzes the strengths, weaknesses, opportunities, and threats faced by each client and the community they serve to incorporate resources into the final recommendations that maximize return. She has helped clients face

challenges in gaining the financial commitment necessary to adopt and implement recommendations.



Dr. Rick Campbell

Ph.D. in Engineering Science and Mechanics, Penn State University
 Bachelor of Science in Applied Mathematics, University of Virginia
 Certified Compensation Professional (CCP)

Dr. Rick Campbell's extensive education and experience in the field of mathematics has enabled him to understand highly technical issues. Because he has managed both internal and external clients, he has developed the ability to take the most advanced problems and convert them into easily understood terms and processes. He has applied this experience to the field of compensation and classification for the past 9 years.

He has worked for NASA GSFC, GE Aircraft, and Lockheed Martin Space Systems among others. His roles included Team Lead, Project Manager and Principal Engineer.

Dr. Campbell holds 7 U.S. and international patents for his creative ideas on product and process improvement. Rick has experience with Lean Six Sigma for both service organizations and manufacturing organizations. He brings his unique skills to Paypoint HR in order to improve the accuracy of our research findings and recommendations.

Rick's knowledge heavily influences the following areas of the audit:

- Performance Based Pay - He has built pay plans that incorporate performance metrics and translates them into fair pay based on relevant goals. His plans maintain objectivity and are multifaceted. He has established performance review processes and standards for merit-based compensation pay. He has converted organizations to pay-for-performance that desired merit-pay programs and were limited by existing policy and structures.
- Big Data and Research Analytics - He has worked on projects that have required large data sets and has created the format to collect and manage the data that maintains integrity and validity. He has engineered programs that are user friendly yet robust in their functionality and interpolates data into meaningful information to a granular level.
- Trends analysis - He has reviewed and analyzed data that look for patterns and correlation to determine if they are valid indicators for comparison. He has looked at causality and correlation links to consider potential for predictability.
- Audit Validity - He has determined appropriate metrics for comparison in the selection of comparator organizations and benchmark positions to ensure relevancy of findings.
- Financial Impact - He has applied both short-term and long-term implications of recommendations for clients to assist in the ability to project necessary funding and revenue sources.

Project Experience & References

Contact Name	Contact Info	Project Title and Service Dates
Susan Sinz Director, Human Resources City of Largo	201 Highland Avenue Largo, Florida 33770 (727) 587-6706 SSinz@Largo.com	Compensation & Classification Study 2019 - 2020, 2022, 2023 - 2024
Roz Johnson Human Resources Director City of Stuart	121 SW Flagler Avenue Stuart, FL 34994 (772) 288-5322 RJohnson@CI.Stuart.FL.US	Classification and Compensation Study 2019
Stephanie Romagnoli Human Resources Manager City of Muscatine	215 Sycamore Street Muscatine, Iowa 52761 (563) 264-1550 SRomagnolis@MuscatineIowa.gov	Compensation Study 2023
Kim Todd Comptroller Eureka County	701 South Main Street Eureka, Nevada 89316 (775) 237-6128 KTodd@EurekaCountyNV.gov	Compensation and Classification Study 2023
Danielle Basora Assistant Town Administrator Town of Goffstown	16 Main Street Goffstown, NH 03045 (603) 497-8990 x102 Danielle.Basora@GoffstownNH.gov	Classification and Compensation Study 2023
Michelle Miner Assistant Town Manager Town of La Plata	305 Queen Anne Street La Plata, MD 20646 301.934 8421 MMiner@TownofLaPlata.org	Classification and Compensation Study 2022
Debbie Duncan HR Manager City of Raytown	10000 E 59 Street Raytown, MO 64133 (816) 737-6006 DebraD@Raytown.MO.US	Compensation & Classification Plan 2021 - 2023
Mike New, PE City Manager City of Newberry	25440 W. Newberry Road Newberry, FL 32669 (352) 472-2161 MNew@NewberryFL.gov	Employee Classification & Compensation Study 2023

* - Presently working with the cities of Largo and St Pete Beach.

Approach/Methods

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

Task 1A - Project Start and Meeting with Board of Commissioners

- Request pertinent materials prior to the project initiation meeting so that Paypoint HR has an understanding of the scope of the study, an understanding of 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 in order to identify needs, make recommendations, and keep positions competitive in the market.
- Maintain open lines of communication.

Task 1B – Baseline Evaluation

- 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.

Task 1C – Job Analysis Collection and Completion

- 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 of time 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

- 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.

Task 1E - Draft of Job Descriptions and Policy Guides

- 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 recommended classification plan;
- A classification implementation and maintenance manual, including documentation regarding study goals and objectives, classification methodology, approach, and process, as well as analysis and resulting recommendations;
- The recommended allocation list, and classification title changes; and
- Classification concepts and guidelines, as well as distinguishing characteristics and other pertinent information for implementation and continued maintenance of the pay plan.

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

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. A list of possible criteria to consider when selecting organizations to be sampled is Median Housing Price, Unemployment Rate, Median Household Income, Labor Force Participation Rate, Cost of Living Adjustment, Proximity, and Population.

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. Paypoint HR will offer information and examples for the Project Leaders to consider and which will provide a measurable, rational, fact-based methodology to determine the relative job worth within the organization (as required by the EEOC).

Task 2B – Design and Distribute Survey

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

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. 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

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.

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.

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

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.

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.

Task 2E - Preparation of Draft Report

The data developed from the internal analysis, will be utilized to develop recommendations regarding internal alignment of salary structures including combining or expanding groups or salary scales for all non-union hourly and salary positions and any corresponding proposed new salary ranges and grade levels for all applicable city positions. We will develop recommendations for pay grades and salary ranges for all classifications based on median and/or mean salaries from the comparable agencies based on the organization's overall compensation philosophy and policy. The end result is intended to create a market adjustment and implementation strategy supporting your goals, objectives, and budget considerations.

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

The Draft Final Report will be completed and submitted to the 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 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 appropriate final adjustments are made prior to delivery of the final report to the designated stakeholders.

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 audit. Once all of your questions and concerns are addressed, a Final Report will be created and submitted in a bound format and electronic format. We feel this is one of our strongest attributes. 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.

Tentative Timeline

Our professional experience is that comprehensive studies of this scope and for this size organization can be expedited to 12-16 weeks to complete, allowing for adequate job analysis completion, compensation data collection and analysis, review steps by the client, the development of a draft final report by the anticipated due date, and implementation material and final report.

Timely progress reports will be provided to the client. Paypoint HR will also provide to the Project Team interim reports as the project progresses. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise. A customized schedule would be constructed in conjunction with both Paypoint HR and the city to meet the project requirements.

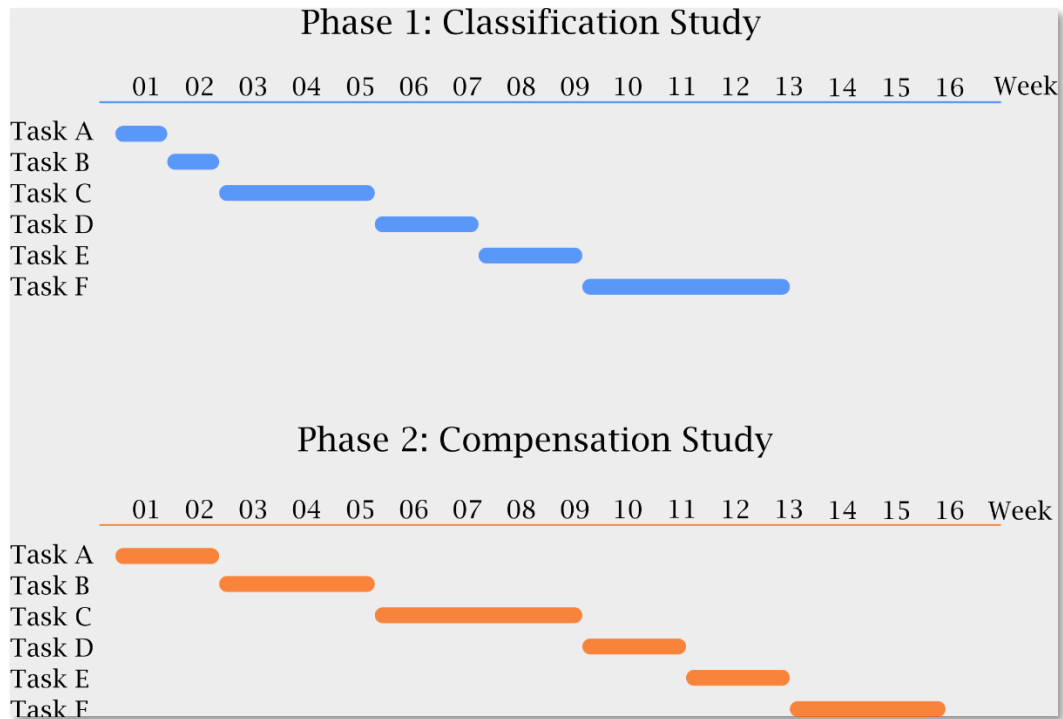


Figure 1 - Gantt Chart

Cost Proposal

PHASE 1 Classification Component

Task		Hours
A	Project Start and Initial Meetings	12
B	Baseline Data Collections & Initial Analysis	24
C	Job Analysis Collection/Completion & Focus Groups	28
D	Job Evaluation and Classification Development	24
E	Draft Job Descriptions and Policy Guides	8
F	Develop Guide for Implementation of Changes and Draft Interim Report	12
	Subtotal Professional Hours	108

PHASE 2 Compensation Component

Task		Hours
A	Identify Benchmark Positions and External Survey Comparator List	12
B	Design and Distribution of Survey	20
C	Collect and Analyze Survey Data	40
D	Internal Relationship Analysis and Internal Alignment	32
E	Preparation of Draft Report	24
F	Deliver Final Report and Work Products for Implementation	24
	Subtotal Professional Hours	152

Total Estimated Hours of Phase 1 & Phase 2	260
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The standard consulting rate for the senior personnel listed, consistent with the Federal GSA schedule, is \$125 per hour of service. For a project entailing 260 hours of service, the total fee would be \$32,500 firm fixed price. Our fee includes expenses associated with travel, phone, materials, and supplies. The total is an estimate of the time needed. Regular invoices, including a thorough delineation of services rendered, would be on a net 30-day basis. Paypoint expects support from the client in communication with key staff, setting up meetings, and providing meeting resources, as well as establishing reporting relationships, milestones, and timelines.

Additional Items

- Comparative Benefit Review - Included. No additional cost.
- Job Description Update - \$5,000 for 59 job titles

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Karin VM Campbell, CEO

[print individual's name and title]

_____ for Paypoint HR

[print name of entity submitting sworn statement]

whose business address is: 695 Santa Maria Ln, Davidsonville, MD 21035 and _____ (if applicable) its Federal Employer Identification Number (FEIN) is ____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: 47-5329087

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
 - (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
 - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
 - (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).

- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
- (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: Karin VM Campbell
Title: CEO
Company: Paypoint HR

NOTARY PUBLIC

STATE OF ~~FLORIDA~~ Maryland
County
~~CITY OF~~ Anne Arundel

Sworn to and subscribed before me this day of 27th January 2024.

by Karin VM Campbell who

is personally known to me OR Produced identification

_____ [type of

identification] My commission expires 3/21/24

Notary Public Signature
[Print, type or stamp Commissioned name of Notary Public]

Dr David R Campbell III
David R Campbell III
#124808

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent	Title
<u>Karin VM Campbell</u>	CEO
Printed Name	Date
<u>Karin VM Campbell</u>	<u>1/30/24</u>



HR, Classification, and Compensation Plans Study Maderia Beach, Florida

Paypoint HR, LLC
695 Santa Maria Lane
Davidsonville, MD 21035
(443) 336 - 4272
Karin@PaypointHR.com
Karin VM Campbell

Experience and Qualifications

Paypoint HR, LLC (Consultant) is responding to the city of Maderia Beach's request for proposals from qualified consultants to provide a comprehensive HR, Classification, and Compensation Plans Study. The purpose of the study is to help the city to be recognized as an employer of choice in the area. Paypoint HR will objectively examine the job roles and their placement in the city's hierarchy, the external market's pay ranges for these same positions, and give recommendations for adjustments of the approximately 83 employees engaged across 59 job titles as warranted by the findings. The study recommendations will be substantiated using quantitative evaluations, so that the city of Maderia Beach may make informed decisions with respect to compensation including benefits. Our Florida registration number is M22000000457.

Our understanding of the project is that Maderia Beach is a full-service city that provides both its residents and tourists with a full range of municipal services including but not limited to fire, recreation, public works, and community development. The city desires to update their current compensation plan in order to keep up with current compensation practices. The purpose is to attract and retain a high performing and engaged workforce that will continue providing excellent service to those who live in the city and those that visit the city's attractions.

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.

Resumes

Founded in 2012, Paypoint HR is an independent Limited Liability Company registered in the State of Maryland who provides the public-sector consulting services on a national level. We are a full-service consulting firm with expertise in classification and compensation structure analysis, organizational design, compliance, research analytics, business strategy, and human resources. Ninety five percent of our work experience is in the public sector.



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

Bachelor of Science in Business Marketing, University of Maryland
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Rick's knowledge heavily influences the following areas of the audit:

- Performance Based Pay - He has built pay plans that incorporate performance metrics and translates them into fair pay based on relevant goals. His plans maintain objectivity and are multifaceted. He has established performance review processes and standards for merit-based compensation pay. He has converted organizations to pay-for-performance that desired merit-pay programs and were limited by existing policy and structures.
- Big Data and Research Analytics - He has worked on projects that have required large data sets and has created the format to collect and manage the data that maintains integrity and validity. He has engineered programs that are user friendly yet robust in their functionality and interpolates data into meaningful information to a granular level.
- Trends analysis - He has reviewed and analyzed data that look for patterns and correlation to determine if they are valid indicators for comparison. He has looked at causality and correlation links to consider potential for predictability.
- Audit Validity - He has determined appropriate metrics for comparison in the selection of comparator organizations and benchmark positions to ensure relevancy of findings.
- Financial Impact - He has applied both short-term and long-term implications of recommendations for clients to assist in the ability to project necessary funding and revenue sources.

Project Experience & References

Contact Name	Contact Info	Project Title and Service Dates
Susan Sinz Director, Human Resources City of Largo	201 Highland Avenue Largo, Florida 33770 (727) 587-6706 SSinz@Largo.com	Compensation & Classification Study 2019 - 2020, 2022, 2023 - 2024
Roz Johnson Human Resources Director City of Stuart	121 SW Flagler Avenue Stuart, FL 34994 (772) 288-5322 RJohnson@CI.Stuart.FL.US	Classification and Compensation Study 2019
Stephanie Romagnoli Human Resources Manager City of Muscatine	215 Sycamore Street Muscatine, Iowa 52761 (563) 264-1550 SRomagnolis@MuscatineIowa.gov	Compensation Study 2023
Kim Todd Comptroller Eureka County	701 South Main Street Eureka, Nevada 89316 (775) 237-6128 KTodd@EurekaCountyNV.gov	Compensation and Classification Study 2023
Danielle Basora Assistant Town Administrator Town of Goffstown	16 Main Street Goffstown, NH 03045 (603) 497-8990 x102 Danielle.Basora@GoffstownNH.gov	Classification and Compensation Study 2023
Michelle Miner Assistant Town Manager Town of La Plata	305 Queen Anne Street La Plata, MD 20646 301.934 8421 MMiner@TownofLaPlata.org	Classification and Compensation Study 2022
Debbie Duncan HR Manager City of Raytown	10000 E 59 Street Raytown, MO 64133 (816) 737-6006 DebraD@Raytown.MO.US	Compensation & Classification Plan 2021 - 2023
Mike New, PE City Manager City of Newberry	25440 W. Newberry Road Newberry, FL 32669 (352) 472-2161 MNew@NewberryFL.gov	Employee Classification & Compensation Study 2023

* - Presently working with the cities of Largo and St Pete Beach.

Approach/Methods

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

Task 1A - Project Start and Meeting with Board of Commissioners

- Request pertinent materials prior to the project initiation meeting so that Paypoint HR has an understanding of the scope of the study, an understanding of 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 in order to identify needs, make recommendations, and keep positions competitive in the market.
- Maintain open lines of communication.

Task 1B – Baseline Evaluation

- 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.

Task 1C – Job Analysis Collection and Completion

- 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 of time 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

- 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.

Task 1E - Draft of Job Descriptions and Policy Guides

- 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 recommended classification plan;
- A classification implementation and maintenance manual, including documentation regarding study goals and objectives, classification methodology, approach, and process, as well as analysis and resulting recommendations;
- The recommended allocation list, and classification title changes; and
- Classification concepts and guidelines, as well as distinguishing characteristics and other pertinent information for implementation and continued maintenance of the pay plan.

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

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. A list of possible criteria to consider when selecting organizations to be sampled is Median Housing Price, Unemployment Rate, Median Household Income, Labor Force Participation Rate, Cost of Living Adjustment, Proximity, and Population.

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. Paypoint HR will offer information and examples for the Project Leaders to consider and which will provide a measurable, rational, fact-based methodology to determine the relative job worth within the organization (as required by the EEOC).

Task 2B – Design and Distribute Survey

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

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. 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

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.

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.

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

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.

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.

Task 2E - Preparation of Draft Report

The data developed from the internal analysis, will be utilized to develop recommendations regarding internal alignment of salary structures including combining or expanding groups or salary scales for all non-union hourly and salary positions and any corresponding proposed new salary ranges and grade levels for all applicable city positions. We will develop recommendations for pay grades and salary ranges for all classifications based on median and/or mean salaries from the comparable agencies based on the organization's overall compensation philosophy and policy. The end result is intended to create a market adjustment and implementation strategy supporting your goals, objectives, and budget considerations.

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

The Draft Final Report will be completed and submitted to the 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 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 appropriate final adjustments are made prior to delivery of the final report to the designated stakeholders.

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 audit. Once all of your questions and concerns are addressed, a Final Report will be created and submitted in a bound format and electronic format. We feel this is one of our strongest attributes. 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.

Tentative Timeline

Our professional experience is that comprehensive studies of this scope and for this size organization can be expedited to 12-16 weeks to complete, allowing for adequate job analysis completion, compensation data collection and analysis, review steps by the client, the development of a draft final report by the anticipated due date, and implementation material and final report.

Timely progress reports will be provided to the client. Paypoint HR will also provide to the Project Team interim reports as the project progresses. We keep our clients fully abreast of all activities that Paypoint HR undertakes during the course of our projects to ensure timely completion and to short-circuit any issues that may arise. A customized schedule would be constructed in conjunction with both Paypoint HR and the city to meet the project requirements.

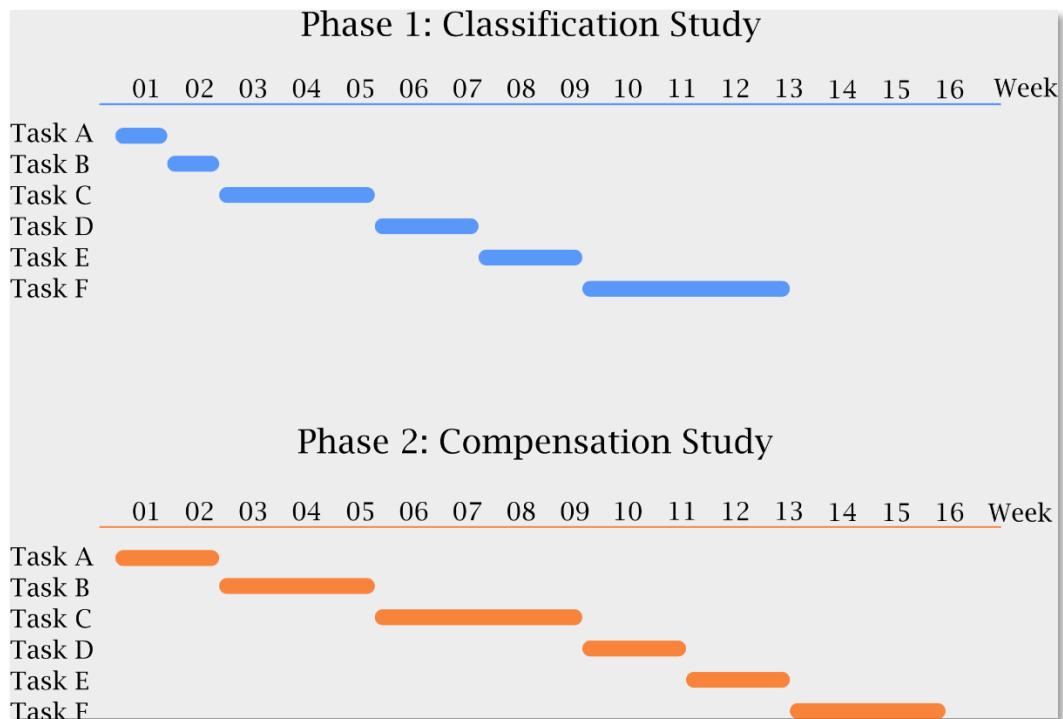


Figure 1 - Gantt Chart

Cost Proposal

PHASE 1 Classification Component

Task		Hours
A	Project Start and Initial Meetings	12
B	Baseline Data Collections & Initial Analysis	24
C	Job Analysis Collection/Completion & Focus Groups	28
D	Job Evaluation and Classification Development	24
E	Draft Job Descriptions and Policy Guides	8
F	Develop Guide for Implementation of Changes and Draft Interim Report	12
	Subtotal Professional Hours	108

PHASE 2 Compensation Component

Task		Hours
A	Identify Benchmark Positions and External Survey Comparator List	12
B	Design and Distribution of Survey	20
C	Collect and Analyze Survey Data	40
D	Internal Relationship Analysis and Internal Alignment	32
E	Preparation of Draft Report	24
F	Deliver Final Report and Work Products for Implementation	24
	Subtotal Professional Hours	152

Total Estimated Hours of Phase 1 & Phase 2	260
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The standard consulting rate for the senior personnel listed, consistent with the Federal GSA schedule, is \$125 per hour of service. For a project entailing 260 hours of service, the total fee would be \$32,500 firm fixed price. Our fee includes expenses associated with travel, phone, materials, and supplies. The total is an estimate of the time needed. Regular invoices, including a thorough delineation of services rendered, would be on a net 30-day basis. Paypoint expects support from the client in communication with key staff, setting up meetings, and providing meeting resources, as well as establishing reporting relationships, milestones, and timelines.

Additional Items

- Comparative Benefit Review - Included. No additional cost.
- Job Description Update - \$5,000 for 59 job titles

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Karin VM Campbell, CEO

[print individual's name and title]

_____ for Paypoint HR

[print name of entity submitting sworn statement]

whose business address is: 695 Santa Maria Ln, Davidsonville, MD 21035 and _____ (if applicable) its Federal Employer Identification Number (FEIN) is ____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: 47-5329087)

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
 - (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
 - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
 - (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).

- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
- (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections
- (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: Karin VM Campbell
Title: CEO
Company: Paypoint HR

NOTARY PUBLIC

STATE OF ~~FLORIDA~~ Maryland
County
~~CITY OF~~ Anne Arundel

Sworn to and subscribed before me this day of 27th January 2024.

by Karin VM Campbell who

is personally known to me OR Produced identification

_____ [type of

identification] My commission expires 3/21/24

Notary Public Signature
[Print, type or stamp Commissioned name of Notary Public]

Dr David R Campbell III
David R Campbell III
#124808

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent

Karin VM Campbell

Title

CEO

Printed Name

Karin VM Campbell

Date

1/30/24



CLASSIFICATION & COMPENSATION STUDY PROPOSAL
RFP#: 24-01 HR

City of Madeira Beach

Issued
January 23, 2024



January 23, 2024

Robin Gomez
City Manager
City of Madeira Beach
300 Municipal Drive
Madeira Beach, FL 33708

Dear Robin:

Please accept the attached proposal in response to our conversation in regard to a classification and compensation study for the City of Madeira Beach. The Pontifex Consulting Group is experienced in conducting studies similar to yours in comparable organizations. We are confident that we can deliver quality service that is second to none.

We have attached a concise proposal that will provide the following information:

- Firm Information
- Staff Resumes
- Project Approach
- Cost Proposal
- Project Timeline
- References
- Required Documentation

We very much appreciate the opportunity to submit this information and look forward to assisting you in performing these consulting services. Should you require any additional information or have questions regarding our attached proposal or fee schedule, please call me at 612.803.3516 or email at pronza@pontifex-hr.

Sincerely,

Peter Ronza, CCP, SPHR
President

Firm Profile

Pontifex Consulting Group LLC

The Pontifex Consulting Group LLC, was formed seventeen years ago by human resources professionals who have extensive experience as both practitioners and consultants in compensation, benefits and other human resources disciplines. We adhere to a client-focused philosophy of highly personal service with integrity, confidentiality, dedication, efficiency, fairness to all parties, and professionalism.

We recognize that your employees are your greatest investment and that they are the key element to the success of your organization. That fact alone requires that you employ a consultant who is experienced and accountable. Our goal is to provide a service experience that is second to none. You should experience nothing less.

Our goal is to satisfy our customer's needs with solutions that will work in relation to your culture. **We do not believe in recommending "cookie-cutter" products or automated programs that are revised to adapt to your organization.** There are as many different methods of classifying and compensating employees as there are different varieties of organizations. That kind of service takes time and effort and is the only way we know of to provide you with the quality professional products that get you where you want to be.

We provide personalized services that are reasonably priced. Your project is serviced from beginning to end with service to you, our customer, as our primary objective. Compensation is a very sensitive issue and we treat it as such. For an employer it is their largest investment and for employees it means putting food on the table and a roof over their head. We take our responsibility very seriously.

Our services are reasonably priced due to the fact that we do not have extensive overhead that we are relying on our clients to support. Through the efficient and effective use of technology and our experience, we can give our clients first class service at affordable prices. We expect to deliver the same value as what we would expect if we were in our client's shoes.

The consultants assigned to your project are the people who are committed to your project's success. We do not dazzle you on-site with talent and then come back home to assign your project to a room full of neophyte employees. Our consultants have decades of professional experience in performing services similar to what is being proposed for your organization. If you have a question or issue, your consultant will be able to address it to your satisfaction.

Published articles and resources may be accessed on our website at:

<https://pontifex-hr.com/resources-publications>

The firm has not experienced any financial difficulties or been involved in any pending or threatened investigations or litigation in its seventeen (17) years of existence.

Firm Profile

Key differentiators from our competitors:

- **Expertise** – The depth of professional experience and skills of staff assigned to this project (as outlined in resume section) is second to none. We have provided services to a wide variety of industries both as consultants and practitioners. We also “give back” to the professional community through publishing, speaking at professional conferences and teaching.
- **Custom Solutions** – There is no “one solution” for an organization or industry. We take the time to assess your culture, needs, and objectives. There are many different methods by which to compensate employees and the solution for your organization must “fit” your organization to be successful. We will never recommend an “off-the-shelf” product that we have used for all our clients. That is against our professional ethics and would ask that you retain another firm if you desire that kind of deliverable.
- **Service** – What you see is what you get. The practitioners who will appear on your worksite at the project implementation meetings will be the individuals who service your contract from beginning to end. We do not have a cadre of neophyte analysts who will be given your project once the team has returned from your organization. If you need to contact us, we will be available. If you need changes, they will be discussed and executed. This is not our project, it is your project.
- **Honesty** – We are being engaged to ensure quality and success. That requires that we engage in a professionally honest relationship. We will present you with options, opinions and recommendations, and will actively listen to you. We are being retained due to our professional experience as your consultants and will engage in such a manner. We will not provide confusing, voluminous proposals and documentation for the purpose of self-aggrandizement.
- **Familiarity with Public Sector** – Although we have provided services for the public sector as consultants, we also have extensive experience as practitioners within organizations. This gives us a valuable insight into the issues, political and cultural, that come into play when designing, implementing and maintaining compensation systems. This is also why we commit to provide assistance at no charge after the study has been delivered.

Firm Profile *(Our People)*



Peter Ronza CCP, SPHR - President

Mr. Ronza will be responsible for managing the project and providing consulting services. He has over thirty years of experience in health care, banking, higher education, government and as a consultant for a variety of industries. He also has been called upon as a resource based on his expertise by print and video media (NBC Nightly News, Wall Street Journal, US News & World Report).

Mr. Ronza is an Adjunct Professor for graduate and undergraduate programs at the Human Resources and Industrial Relations Department of the Carlson School of Management at the University of Minnesota. He also served as an Adjunct Professor at the Organizational Learning and Development Department at the University of St. Thomas.

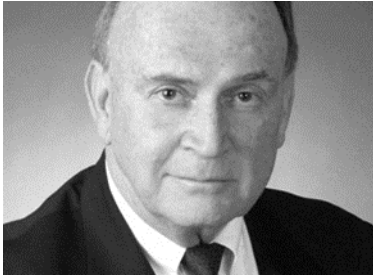
Mr. Ronza is also an expert on regulatory issues such as the Fair Labor Standards Act (FLSA). He has assisted a variety of clients in ensuring that they are in compliance with overtime and equal pay provisions of the act. He advises clients on designing their workforce structures to ensure that they are in compliance with regulations while at the same time achieving organizational objectives.

Mr. Ronza has a Master's degree in Human Resources/Industrial Relations from the University of Minnesota.

Mr. Ronza is a member of:

- WorldatWork (formerly American Compensation Association) and has his Certified Compensation Professional (CCP) certification.
- Society for Human Resources Management and has his Senior Professional Human Resources (SPHR) certification. He also served on the Total Rewards Special Expertise Panel (2005-2008) and the Ethics Special Expertise Panel (2010-2012) that provided advice and professional services to the 285,000 members of SHRM.

Firm Profile *(Our People)*



Robert Greene Ph.D. – Consulting Principal

Dr. Greene is a Consulting Principal with our compensation and human resources management consulting practice. He will be responsible for cultural assessment, classification analysis, quality assurance and composition of the final report. He has over forty years of human resources consulting experience with a wide variety of organizations.

Dr. Greene is an expert on consulting with organizations on formulating human resources management strategies and designing, implementing, administering and evaluating performance and compensation management programs. He also provides counsel on defining, assessing and reshaping organizational culture and the effective management of cross-cultural workforces.

Dr. Greene has written four books (Rewarding Performance; Rewarding Performance Globally; The Most Important Asset: Valuing Human Capital; Strategic Talent Management) and over 100 articles on HR and compensation management, performance management, organizational culture and change management. He was awarded the first Keystone Award for attaining the highest level of excellence in the field by the American Compensation Association (now WorldatWork). He serves as adjunct faculty at DePaul University and a faculty member for the CPHRC certification program offered in countries around the world.

Dr. Greene has a Ph.D. in Applied Behavioral Science from Northwestern University and an MBA from the University of Chicago.

Dr. Greene is a member of:

- WorldatWork (formerly ACA) and has his Certified Compensation Professional (CCP), Certified Benefits Professional (CBP) and Global Remuneration Professional (GRP) certifications.
- Society for Human Resources Management (SHRM) and has his Senior Professional Human Resources (SPHR), Global Professional Human Resources (GPHR) and SHRM-SCP certifications. He has served as a designer and faculty member for SHRM's professional development programs and was a principal designer of the PHR/SPHR certifications.
- Society for Industrial and Organizational Psychology (SIOP), a division of the American Psychological Association.

Firm Profile *(Our People)*



David Gramer CCP, GRP, PHR – Consultant

Mr. Gramer will be responsible for providing market analysis and compensation system design services on this project. He has over eighteen years of compensation experience, which include external and internal consulting, and ten of which have been working with national and global compensation and expatriate programs.

Mr. Gramer has served as an adjunct professor of Global Business and Human Resources programs. He has also served as a guest speaker on these topics at colleges and universities as well as professional associations.

Mr. Gramer has a Master's degree in Business Administration from the University of St. Thomas.

Mr. Gramer is a member of:

- WorldatWork (formerly American Compensation Association) and has his Certified Compensation Professional (CCP) certification, as well as his and Global Remuneration Professional (GRP) certifications.
- Society for Human Resources Management and has his Professional Human Resources (PHR)

Firm Profile *(Our People)*



Anthony Wade PhD, APM, PHR – Consultant

Dr. Wade will be responsible for providing equity analysis and compensation system design services on this project. He has over thirty years of compensation experience, which include external and internal consulting, conflict management, and assisting organizational leaders in driving inclusive business practices and cultural change.

Mr. Wade is a life-long member and former regional Vice President of the National Association of African Americans in Human Resources (NAAAHR). He was a founding member of NAAAHR Colorado State Chapter and its first President. He is a skilled facilitator and has served as a guest speaker on at regional state and national conferences on the topics of diversity, equity and inclusion.

Dr. Wade has a PhD from Colorado State University and is a graduate of the Defense Equal Opportunity Management Institute.

Dr. Wade is a member of:

- Society for Human Resources Management and has his Professional Human Resources (PHR)
-

Firm Profile *(our People)*



Jerry Keating IPMA-SCP, SPHR – Consultant

Mr. Keating will be responsible for employee communications, outreach, onsite consultation and system development services on this project. He has over twenty years of human resources experience, which extensive experience in labor relations, mediation, collective bargaining and arbitration. He has an additional ten years of consulting experience nationwide in all areas of human resources management. He is often called upon to provide training for organizations in systems implementation and conflict resolution.

Mr. Keating has a Master’s degree in Business Administration from Columbia Southern University.

Mr. Keating is a member of:

- International Public Management Association for Human Resources (IPMA-HR) and has his IPMA-HR Senior Certified Professional certification (IPMA-SCP).
 - Society for Human Resources Management and has his Senior Professional Human Resources (SPHR) certification.
-

Project Approach

The purpose of the comprehensive compensation study is to evaluate the labor market competitiveness of the compensation plan for the City of Madeira Beach (Client).

Given our desire to provide customized service to the Client, we believe our proposal is straightforward and identifies the core elements of the study. Our services are flexible so as to take into account your needs and any conclusions or requirements during the project. The Pontifex Consulting Group (Consultant) will perform the following tasks to achieve the Client’s goals and objectives:

Project Approach

Task I Project Initiation & Onsite Meetings

- Project Initiation
- Examination of Current Programs
- Total Compensation Philosophy
- Project Administration
- Initial Employee Communication

Task II Classification Analysis

- Position Information (Job Analysis)
- Create Job Descriptions
- Review Phase
- Job Evaluation Process



Task IV Project Report

The end result is to design, implement and maintain a compensation system that allows for the recruitment, retention and recognition of employees while adhering to the compensation philosophy of the Client.

Task III Compensation Analysis

- Collect Labor Market Compensation Data
- Market Data Analysis
- Salary Structure Design & Implementation

Project Approach *(Continued)*

Task I – Project Initiation & Onsite Meetings

Task	Description
Organizational Strategy	The Consultant will discuss with the Client organizational objectives and cultural perspectives to ensure that they are taken into account in the development of programs that will serve your needs today and in the future. We will engage onsite with management, human resources, and other staff members as required to obtain information or clarification necessary for project deliverables.
Human Resources Strategy	The Consultant will engage in overall discussion of the human resources strategy to attract, retain, develop and motivate staff, as well as meet the changing needs of the workforce. We will also examine how the compensation program supports other human resources initiatives for the workforce.
Current Program Review	The Consultant will review existing job descriptions, organization charts, job evaluation and salary administration methodology, and all other relevant job classification material. These actions will allow us to provide recommendations on how to guide the study to a successful completion. We will seek clarification and follow-up during our onsite meetings with management staff.
Total Compensation Philosophy	The Consultant will confirm the Client’s Total Compensation (compensation and benefits) philosophy and assist in the drafting of an official document, if required. It is critical for the Consultant to completely understand the Client’s total compensation philosophy and it’s role in the attraction, retention and motivation of staff. Consultant will also discuss and reach agreement on the competitive labor markets to be used for benchmarking purposes.
Project Administration	The Consultant will work with the Client to confirm the schedule of deliverables for the study. We will also clarify involvement of the Client’s staff to ensure timely completion of tasks, approval of documents and distribution of communication materials.
Initial Employee Communications	Consultant will conduct employee, supervisor and manager briefing sessions at various times and locations as desired by the Client. These meetings will communicate the study’s objectives and allow for employee input. These sessions are of great value to inform employees and will enhance the Client’s ability to encourage engagement and acceptance. Consultant will also develop draft communications material as desired by Client.
Task Outcome	
The outcome of this Task is a philosophy and strategy that will serve as the basis to evaluate current programs, guide the alignment of the compensation programs, and reach agreement on study goals, objectives and deliverables. The Consultant will also conduct desired communication with managers and staff.	
Task Timeline	
The timeline to complete this Task is typically one to two weeks. We will collect organizational information prior our onsite visit and work with the Client to schedule the onsite meetings. Onsite meetings will comprise two days after which the Consultant will have obtained all relevant information necessary to proceed with the study.	

Project Approach *(Continued)*

Task II – Classification Analysis

Based on the study objectives outlined in Task I, a classification analysis will be conducted of all covered jobs. Jobs will be examined to ensure description of work is current and in a relevant format. This process will also result in a job evaluation with the objective of providing a system that reflect the current classification of work while adhering to the culture of the organization. This will deliver internal equity while providing a system that can be maintained by internal staff.

Task	Description
Position Information (Job Analysis)	Consultant will utilize Position Description Questionnaires (PDQ) that will be distributed to employees for them and their supervisor to complete with relevant information in regard to their job’s duties, responsibilities and requirements. Upon examination of the PDQs, Consultant will conduct onsite interviews with management staff to clarify questions and resolve any issues. Consultant will not complete this stage of the study until they have acquired a complete understanding of Client’s operations and jobs.
Finalize Job Descriptions	Based upon the job analysis process, Consultant will develop any recommendations for new/revised job descriptions, in a format acceptable to Client that ensures all requirements regarding essential functions and minimum qualifications are included. Job descriptions will be composed in a manner that complies with ADA, EEO standards, and other legally required information. Consultant will also conduct Fair Labor Standards Act (FLSA) exemption tests using current United States Department of Labor FLSA guidelines.
Review Phase	Client Human Resources and management staff will review and comment on job description drafts and classification recommendations. Consultant will review and revise job description drafts as appropriate.
Job Evaluation Process	Consultant will utilize the appropriate job evaluation methodology to provide a recommendation for a classification system that reflects the Client’s organizational structure and culture. It will incorporate job families (where appropriate) and clear career progression paths. There is no “one” system that can be utilized for every organization. We do not sell a “one-size-fits-all” methodology as a solution to your needs. The structure must also be constructed in a way that will allow for inhouse staff to maintain and administer the system after the study is completed. The Client will provide input in regard to the Consultant’s recommendations and changes will be made as appropriate.
Task Outcome	
The outcome of this Task is an analysis of the organization’s jobs, composition of job descriptions in a desired format, and job evaluation of those jobs that provides a classification structure. The structure will be developed utilizing a job evaluation system that is best suited to the Client’s mix of jobs, assignment of duties, and culture while providing a standard of internal equity. Inhouse staff will acquire training into new plan by Consultant explaining this process as it occurs. Understanding construction of the system will enhance comprehension of administration of the system.	
Task Timeline	
The timeline to complete this Task will be about eight weeks to maintain the overall project timeline.	

Project Approach *(Continued)*

Task III – Compensation Analysis

Based on the study objectives outlined in Task I, a compensation survey will be conducted. The competitive labor market data will be analyzed to determine the current competitive stance of the Client compared to its total compensation philosophy and strategy.

Task	Description
Collect Labor Market Data	The Consultant will work with the Client to identify and confirm specific labor market competitors that will be contacted to provide compensation and benefits data. The Consultant will design custom market survey(s) and follow-up with respondents to ensure accurate analysis and reporting of information. The Consultant possesses published professional salary surveys that will provide for additional data if required.
Market Data Analysis	The Consultant will collect and analyze data to ensure accuracy and reliability of data. Follow-up will be conducted with competitors to ensure accuracy and relevancy of data. We will then analyze the current compensation of Client employees in relation to the competitive labor market data to determine the Client’s positioning, both on an individual and aggregate basis.
Market Best Practices	The analysis will also survey competitor best practices and determine where they may be of value in consideration of the Client’s compensation philosophy and strategy outlined in Task I. The principles will be discussed, and recommendations provided for possible inclusion of concepts into the plan design.
Market Position	The Consultant will analyze the current compensation of Client’s jobs in relation to the competitive labor market data to determine if the Client leads, matches, or lags the market based on the Client’s compensation philosophy.
Salary Structure Design	Client management staff will review and comment on recommendations for a salary structure that reflects market alignment as well as internal equity. The structure will also be constructed in a manner to avoid salary compression. Consultant will also provide financial impact scenarios to assist the Client in the implementation of said recommendations. Consultant will review, discuss and revise recommendations as appropriate.
Impact Analysis	Consultant will provide financial modeling and system implementation recommendations. Identification of any compensation outliers/concerns and appropriate options for remediation will also be provided. Consultant will also provide policy language and guidelines for the administration of the system to address placement of staff in a variety of circumstances (recruitment, promotion, reclassification, etc.).
Task Outcome	
The outcome of this Task is an analysis of the Client’s position to their competitive labor market and the development of a compensation structure. The structure will be developed utilizing standard compensation analytical tools, such as regression analysis, as appropriate to prevent pay compression and other issues commonly associated with salary structures. Inhouse staff will acquire training into new plan by Consultant explaining this process as it occurs. Understanding construction of the system will enhance comprehension of administration of the system.	
Task Timeline	
The timeline to complete this Task will be about six weeks to maintain the overall project timeline.	

Project Approach *(Continued)*

Task IV – Project Report

The Consultant will prepare a comprehensive report that will summarize the processes used to conduct the study as well as the findings and recommendations of the study. The Client will have an opportunity to review and discuss the report with the Consultant. Based on these discussions, the Consultant will update and finalize the report.

Task	Description
Report Elements	<ol style="list-style-type: none"> 1. Detailed summary of the job analysis process. 2. New/revised job descriptions. 3. Job evaluation system recommendations (internal equity) 4. Results of the comparative compensation and benefits (external equity) analysis. 5. Recommendation for a base compensation structure(s) for all jobs that will align with compensation philosophy. 6. Recommendations on how to transition from the current to the new system. 7. Recommendations on a process to update and keep the system current. 8. Draft policies and procedures for system administration practices. 9. Recommendations on implementation options. 10. Financial impact analysis on the implementation of Consultant’s recommendations. 11. Training for Client staff that will enable them to maintain the system following its implementation. 12. FLSA analysis and audit sheets for all jobs that pass the exemption tests
Onsite Presentations	The Consultant will be available to present the findings and recommendations to the City Council, management, and staff (as desired). This will allow all parties an opportunity to ask questions and have a complete understanding of the goals, objectives and deliverables of the study.
Study Documentation	All study documentation will be provided to the Client in electronic formats (Windows compatible files). There is no need or value for the Client to expend additional resources to acquire a licensed automated system. Maintenance can easily be performed by Client staff utilizing Excel and their existing ERP system.
System Training	Consultant will provide training to inhouse staff regarding how to maintain the classification and compensation programs. Again, our goal is to provide you a system that requires little outside involvement from a consultant. Included with this training are desired policy language that will address procedures, adjustment practices and career progression processes.

The end result is to design, implement and maintain a compensation system that allows for the recruitment, retention and recognition of employees while adhering to the compensation philosophy of the Client.

Cost Proposal

Total cost for the study is proposed based upon the employee population and services mentioned in your RFP. All expenses are included in this proposal.

The following line-item schedule summarizes the different study tasks costs:

Project Initiation & Onsite Meetings	\$3,500
Classification Analysis	\$10,000
Compensation Analysis	\$5,750
Project Report	\$4,750
<hr/>	
TOTAL COST	\$24,000

The Consultant agrees to answer questions and provide implementation assistance at no additional cost pertaining to this study for a minimum of twelve (12) months following the date of study completion to ensure that the system/products that we have provided are administered properly.

For work beyond that specified in this proposal, we would be happy to quote a flat rate that is more equitable to the achievement of the desired tasks and mindful of the financial resources of the Client.

Project Timeline

The following timeline is based upon services requested by the Client to complete the study. Consultant will revise this proposal based upon initial consultation with Client during Task I.

Task and Weeks	1	2	3	4	5	6	7	8	9	10	11	12
<u>Task I:</u> Project Initiation & Onsite Meetings												
<u>Task II:</u> Classification Analysis												
<u>Task III:</u> Compensation Analysis												
<u>Task IV:</u> Project Report												

References

Recent clients served on projects similar in scope:

City of Kentwood, Michigan

We were retained to conduct a classification and compensation study for 250 represented and non-represented staff. All staff completed job questionnaires from which classification descriptions were composed. Compensation and benefits analyses were based upon custom and published survey sources. We assisted the Mayor with Board briefings and the creation of a compensation study committee. Deliverables consisted of compensation philosophy and strategies, new classification descriptions, a new classification structure, and compensation programs. We completed a classification and compensation review in 2022.

Contact: Gail Dewey, Director of Human Resources, 616.554.0732
deweyg@ci.kentwood.mi.us.

City of Elmhurst, Illinois

We were retained to conduct a classification and compensation study for staff. This included a combination of analyses based upon custom and published survey sources. Deliverables were the composition of a compensation philosophy and strategies, new classification, compensation and benefits programs. A point of emphasis was to monitor and provide recommendations on pay compression between non-bargaining and bargaining groups. We conducted compensation system updates and presentations for the City Council in 2017 and 2019. We conducted a classification and compensation review in 2022.

Contact: James Grabowski, City Manager, 630.530.3010
james.grabowski@elmhurst.org

Village of Westchester, Illinois

We performed a classification and compensation study for all Village jobs. This included completion of PDQs, review of draft classification descriptions, a combination of labor market analyses based upon custom and published survey sources. Deliverables were new classification descriptions, compensation philosophy and pay practices for the organization. We are currently assisting with a new performance management program.

Contact: John Schwartz, Assistant Village Administrator, 708.345.0200, ext. 594
jschwartz@weschester-il.gov

References *(continued)*

Harnett County, North Carolina

We conducted a compensation study to determine labor market positioning of County jobs. This includes a variety of analyses based upon custom and published survey sources. We are consulting on pay structure, practices and policies that will ensure labor market competitiveness and the effect of pay compression on the compensation structure.

Contact: Janice Lane, Director Human Resources, 910.814.6401

jlane@harnett.org

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by Peter Ronza, President

[print individual's name and title]

for Pontifex Consulting Group

[print name of entity submitting sworn statement]

whose business address is: 1841 113th Avenue NE, Blaine MN 55449 and (if applicable) its Federal Employer Identification Number (FEIN) is 20-5623430 (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
 - (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
 - (iii) any available drug counseling, rehabilitation, and employee assistance programs; and
 - (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).

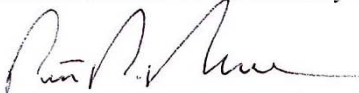
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
 - (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections
(1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).



Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: 
Title: President
Company: January 23, 2024

NOTARY PUBLIC

STATE OF MINNESOTA

CITY OF Minneapolis

Sworn to and subscribed before me this day of January, 2024.

by Peter Ronza who

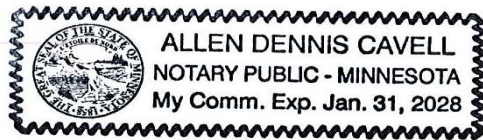
is personally known to me OR Produced identification

_____ [type of

identification] My commission expires 1-31-2028


Notary Public Signature

[Print, type or stamp Commissioned name of Notary Public]



Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent

Title

Printed Name

Date

City of Madeira Beach
RFP 24-01



Date: February 9, 2024

Bid opening: 3:00 PM

Bid Tabulation

RFP #24-01 Comp & Classification Study

Company	Amount
pontifex consulting, LLC	\$24,000 16 wks to complete
pay point HR, LLC	\$32,500 16 wks to complete
	↳ job titles / descr. plus \$5000 for 59 pos.
Bolton partners, Inc	\$34,300 16-14 wks to complete
	↳ plus \$7500 job titles / descriptions.
Evergreen Solutions, LLC	\$35,500 16 wks to complete
AutoSolve, Inc.	\$29,625.00 3 months to complete (12 wks)
	↳ add. work @ \$187.50/hr



Date: February 9, 2024

Bid opening: 3:00 PM

Bid Tabulation

RFP #24-01 Comp & Classification Study

Company	Amount
Gallagher Benefit Solutions Services, Inc	\$54,650 - \$79,650; 7 months
Cody & Associates	\$13,500 plus ; 3 months
Gehring Group	↳ \$1,500 Benefits \$2,200 Job descriptions
Gehring Group	\$27,640 ; 12 wks
	↳ plus \$10,000 Job des. \$10,000 Benefits



Date: February 9, 2024

Bid opening: 3:00 PM

Bid Opening Sign in Sheet

RFP #24-01 Comp & Classification Study

Name	Company	Email	Phone
Robin Gomez	City of Madeira		
Megan Powers	City of Madeira		
Clara VonBargan	City of Madeira Beach		



Date: February 9, 2024

Bid opening: 3:00 PM

Bid Tabulation

RFP #24-01 Comp & Classification Study

Company	Amount
Pontifex Consulting, LLC	Proposal: \$24,000; Estimates 16 weeks to complete study
Pay Point HR, LLC	Base Proposal:\$ 32,500, plus \$5,000 for 59 Job descriptions; Estimates 16 weeks to complete study
Bolton Partners, Inc	Proposal: \$24,000, plus \$7,500 for Job descriptions; Estimates 10-14 weeks to complete study
Evergreen Solutions, LLC	Proposal: \$35,500; Estimates 16 weeks to complete study
AutoSolve, Inc.	Proposal: \$29,625, plus \$187.50 for additional work outside of scope; Estimates 12 weeks to complete study
Gallagher Benefit Services, Inc.	Proposal: \$54,650 - \$79,650; Estimates 7 months to complete study
Cody & Associates	Proposal: \$13,500, plus \$1,500 for benefits, \$2,200 for Job descriptions; Estimates 3 months to complete study
Gehring Group	Proposal: \$27,640, plus \$10,000 for Job descriptions, \$10,000 for benefits; estimates 12 weeks to complete study

RFP 24-01 – HR Comp & Classification Study

Proposal Reference Contacts

- Largo: knicholls@Largo.com
 - PayPoint
 - AutoSolve
- St. Pete Beach: jsassone@stpetebeach.org
 - PayPoint
- Newberry: tfair@newberryfl.gov
 - PayPoint
- Dunedin: tsmalling@dunedinfl.net
 - Gehring Group
 - Evergreen Solutions
 - Bolton Partners/Bolton USA
 - AutoSolve
- Oldsmar: mkutch@myoldsmar.com
 - Gehring Group
 - Evergreen Solutions
- TI: jzamora@mytreasureisland.org
 - Gehring Group
- Clearwater: Crystal Riles; Chrystal.Ryals@myclearwater.com- OOO until Monday
 - Gehring Group
 - Evergreen Solutions
- Belleair: nfreeman@townofbelleair.net
 - Evergreen Solutions
- New Port Richey: Wetzela@cityofnewportrichey.org
 - Evergreen Solutions
- Pinellas County: kfnelson@pinellas.gov
 - Evergreen Solutions
- Lakeland: Andrea.Shaner@lakelandgov.net
 - Bolton Partners/Bolton USA
- Melbourne: Called and was told to send to generic email box; Human.resources@melbfl.gov
 - Bolton Partners/Bolton USA
- Indian Rocks Beach: eatkinson@irbcity.com
 - AutoSolve



Request for Proposal #2024-01

HR, Classification, and Compensation Plans Study

Proposals due by Friday, February 9, 2023

At 3:00 pm

M a d e i r a B e a c h

C i t y H a l l

300 Municipal Drive

Madeira Beach, FL 33708

CONTACT:

Robin I. Gomez, City Manager

Phone: 727-580-8014

Email: rgomez@madeirabeachfl.gov

REQUEST FOR PROPOSAL / INTRODUCTION

The City of Madeira Beach is seeking proposals from qualified consultants to conduct a comprehensive HR (human resources), classification, and compensation study and analysis.

Qualified firms must have a minimum of five (5) years of public sector experience.

The City of Madeira Beach reserves the right to reject or accept any proposal or to waive any irregularities in any proposal deemed to be in the best interest of the City of Madeira Beach.

Firms/vendors are required to submit written proposals that present the vendor's qualifications and understanding of the work to be performed. The firm's/vendor's proposal should be prepared simply and economically and should provide all the information it considers pertinent to its qualifications for the specifications listed herein.

The proposal must be submitted via mail or email no later than 3:00 pm, Friday, February 9, 2024, contact below:

City of Madeira Beach
 Attn: Robin I. Gomez
 Re: RFP 24-01 HR, Classification, and Compensation Plans Study
 300 Municipal Drive Madeira Beach, FL 33708
 or rgomez@madeirabeachfl.gov

NOTIFICATION: The City utilizes the following methods for notification and distribution of solicitation opportunities:

- City of Madeira Beach website www.madeirabeachfl.gov
- Demand Star

INDEMNIFICATION AND INSURANCE

The City shall be held harmless for all claims, liability, losses, and causes of action which may arise out of its fulfillment of the contract awarded pursuant to this RFP. It agrees to pay all claims and losses, including related court costs and reasonable attorneys' fees, and shall defend all suits filed due to negligent acts, error or omissions or Respondent employees and/or agents.

The Respondent agrees to indemnify the City and pay the cost of the City's legal defenses, including fees of attorneys as may be selected by the City, for all claims described in the hold harmless clause herein. Such payment on behalf of the City shall be in addition to all other legal remedies available to the City and shall not be considered the City's exclusive remedy.

In the event the completion of a project awarded pursuant to this RFP (to include the work of others) is delayed or suspended because of the Respondent's failure to purchase or maintain the required insurance, the Respondent shall indemnify the City from all increased expenses resulting from such delay. It is agreed by the parties hereto that the Respondent/Vendor has received specific consideration under the agreement for this hold harmless/indemnification provision.

Subcontractors: Proposer shall require and verify all subcontractors maintain insurance, including workers' compensation insurance, subject to all the requirements stated herein prior to beginning work.

ASSURANCES

The responding firm shall provide a statement of assurance that the firm is not presently in violations of any statutes or regulatory rules that might have an impact on the firm's operations. All applicable laws and regulations of the State of Florida and ordinances and regulations of the City will apply.

DEVIATIONS FROM SPECIFICATIONS

Respondents shall clearly indicate, as applicable, all areas in which the items/services he/she proposes do not fully comply with the requirements of this submittal. The decision as to whether an item fully complies with the stated requirements rests solely with the city.

NO COLLUSION

By offering a submission to this request, the responder certifies that no attempt has been made or will be made by the responder to induce any other person or firm to submit or not to submit a submission for the purpose of restricting competition. The only person(s) or principal(s) interested in this submission are named therein and that no person other than those therein mentioned has/have any interest in this submission or in agreement to be entered. Any prospective firm should make an affirmative statement in its proposals to the effect that, to its knowledge, its retention would not result in a conflict of interest with any party.

TERMINATION

The resulting contract may be canceled by the City when:

- a. 30-days for cause
- b. 90-days without cause

SUBMITTAL WITHDRAWAL

After submittals are opened, corrections or modifications to submittals are not permitted, but a respondent may be permitted to withdraw an erroneous submittal prior to the award by the City Commission, if the following is established:

- a. That the respondent acted in good faith in submitting the submittal.
- b. That in preparing the submittal there was an error of such magnitude that enforcement of the submittal would create severe hardship upon the respondent.
- c. That the error was not the result of gross negligence or willful inattention on the part of the respondent.
- d. That the error was discovered and communicated to the City within twenty-four (24) hours of submittal opening, along with a request for permission to withdraw the submittal.
- e. The respondent submits documentation and an explanation of how the error was made.

TAXES, FEES, CODES, LICENSING

The awarded firm shall be responsible for payment of all required permits, licenses, taxes, or fees associated with the project. The awarded firm shall also be responsible for compliance with all applicable codes, laws, and regulations.

PUBLIC RECORDS

Contractor acknowledges that it is acting on behalf of a public agency; this Agreement is subject to the provisions of §119.0701, Florida Statutes, and; that Contractor must comply with the public records laws of the State of Florida. Contractor shall:

- (1) Keep and maintain public records required by the public agency to perform the service.
- (2) Upon request from the public agency's custodian of public records, the Contractor shall provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time and at a cost that does not exceed the costs provided in this chapter or as otherwise provided by law.
- (3) The Contractor shall ensure that public records that are exempt or confidential and, therefore exempt from public records disclosure requirements, are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract.
- (4) The Contractor shall, upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Contractor or keep and maintain public records required by the public agency to perform the service. If the Contractor transfers all public records to the public agency upon completion of the contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and, therefore, exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.
- (5) A request to inspect or copy public records relating to a public agency's contract for services must be made directly to the custodian of public records for the public agency. If the public agency does not possess the requested records, the public agency shall immediately notify the Contractor of the request. The Contractor must provide the records to the public agency or allow the records to be inspected, copied, or photographed within a reasonable time and in compliance with the requirements of §119.07, Florida Statutes.
- (6) If Contractor does not comply with a public agency's request for records, the public agency shall enforce the contract provisions in accordance with the contract.

- (7) A Contractor who fails to provide public records to the public agency within a reasonable time may be subject to penalties under §119.10, Florida Statutes.
- (8) If a civil action is filed against a Contractor to compel production of public records relating to a public agency's contract for services, the court shall assess and award against the Contractor the reasonable costs of enforcement, including reasonable attorney fees, if:
- a. The court determines that the Contractor unlawfully refused to comply with the public records request within a reasonable time, and.
 - b. At least eight (8) business days before filing the action, the plaintiff provided written notice of the public records request, including a statement that the Contractor has not complied with the request, to the public agency and to the Contractor.
 - c. The notice requirement is satisfied if written notice is sent to the public agency's custodian of public records and to the Contractor at the Contractor's address listed in this contract with the public agency or to the Contractor's registered agent. Such notices must be sent by common carrier delivery service or by registered, Global Express Guaranteed, or certified mail, with postage or shipping paid by the sender and with evidence of delivery, which may be in an electronic format.
- (9) A Contractor who complies with a public records request within 8 business days after the notice is sent is not liable for the reasonable costs of enforcement.
- (10) If the Contractor Has Questions Regarding the Application of Chapter 119, Florida Statutes, To The Contractor's Duty To Provide Public Records Relating To This Contract, Contact The Custodian Of Public Records At:

City of Madeira Beach, Attn: City Clerk
 Madeira Beach, FL 33708
 727-391-9951, Ext. 231 or cvanblargan@madeirabeachfl.gov

PART A

ADDENDA: Any interpretations, corrections, or changes to this REQUEST FOR PROPOSAL will be made by addenda. Sole issuing authority shall be vested in the City of Madeira Beach's City Manager's Office. Addenda will be posted and available through the City notification methods shown above.

SUBMISSION: Firms responding must submit one (1) electronic copy (USB-PDF format) and five (5) copies. Proposals must be received on or before the Due Date and Time (local time) listed in the below RFP Submittal Date and Time at the City Hall Lobby reception desk located at 300 Municipal Dr., Madeira Beach, Florida, 33708 or via email to rgomez@madeirabeachfl.gov. Proposals must be clearly marked "**RFP 24-01 HR, Classification, and Compensation Plans Study,**"

LATE PROPOSALS: Proposals received at the City of Madeira Beach City Hall after the Due Date and Time

shall be considered non-responsive. It is the sole responsibility of Proposer to ensure its Proposal is received by the City by the Due Date and Time. The City is not responsible for the lateness due to weather conditions, delivery service, or any other reasons.

PROPOSAL OPENINGS: All Proposals submitted before the Due Date and Time shall be publicly opened by the City Manager at the City Hall Building, located at 300 Municipal Dr. Madeira Beach, FL on the day and time indicated.

SCHEDULE: A summary schedule of the major activities associated with this solicitation is presented below. The City, at its sole discretion, may modify this schedule as the City deems appropriate.

ACTIVITY	DATE
Advertisement for Proposal & RFP Issued	Friday, January 12, 2024, 10 am
Questions Due	Friday, January 26, 2024, 2 pm
RFP Submittal Date and Time	Friday, February 9, 2024, no later than 3:00 pm
Evaluation Committee Review*	Tue, February 20, 2024 – Wed, February 21, 2024, time TBD
Selection/Recommendation to Civil Service Commission for Review*	Thursday, March 7, 4:00 pm
Selection/Recommendation to City Commission for Review*	Wed, March 13, 6:00 pm
Commission to award contract*	Wed, April. 10, 6:00 pm

*Tentative and subject to change

MEETING LOCATIONS:

- **City Hall** - located at 300 Municipal Dr. Madeira Beach, FL 33708
- **POINT OF CONTACT:** For information concerning procedures for responding to this Request for Proposal, contact the City Manager via email at rgomez@madeirabeachfl.gov. Such contact shall be for clarification purposes only.

QUESTIONS: Each Proposer must examine this proposal, which incorporates all its addenda, instructions, special conditions, and attachments to determine if the requirements are clearly stated. All questions concerning this proposal, such as discrepancies, omissions and exceptions to any term or condition of the REQUEST FOR PROPOSAL documents, including the Sample Agreement, should be submitted in writing. Questions of a material nature must be received prior to the Deadline for Delivery of Questions specified in the schedule.

EVALUATION AND SELECTION OF CONSULTANT

A City review team will evaluate each firm's submission based upon the criteria stated in this Request for Proposal and the ability to execute the services. The top firms *may* be invited to make oral presentations of their proposals to the evaluation team. Following the evaluation process, the team will then select the firms that the city considers most qualified. The successful Firm(s) will be requested to enter negotiations to produce a contract for this assignment. The City reserves the right to negotiate modifications to Statements of Qualifications that it deems acceptable. The City reserves the right to terminate negotiations in the event it deems the progress towards a contract to be insufficient.

Pursuant to Florida Statutes § 287.05701(3), prospective Proposers are notified that the City will not request documentation of or consider a vendor's social, political, or ideological interests when determining if the vendor is a responsible vendor, nor will it give preference to a vendor based on the vendor's social, political, or ideological interests.

Firms will be evaluated in accordance with the weighted criteria listed below. All criteria will be graded on a 1-5 scale, with 1 being the lowest score possible and 5 being the highest score. Criteria may also be weighted based upon each individual reviewer's determination of level of importance. Criteria will be weighted on a 1-10 scale, with 1 being not as important and 10 being the most important criteria.

Selection Criteria are as follows:

- Qualifications, staffing, reputation
- Understanding of the scope of services/work
- Demonstrated ability to meet requirements
- Experience and expertise
- Client/end user satisfaction
- Quality Assurance Control Program/Policy

Once the Evaluation Committee has reviewed all Proposals it will rank them in order of preference and will provide its recommendations to the City Manager for presentation to the Civil Service. If the Manager concurs with the rankings, then the Manager will, either directly or through a designee, negotiate final terms and conditions, including a project schedule and project budget. The successful Proposer will be required to execute a contract with the City containing such terms and conditions as the Proposer and Manager negotiate. Once the Proposer executes the agreement, the City will approve the agreement in the manner set forth in § 2-193 of the City Code.

PART B:

PURPOSE:

The City of MADEIRA BEACH is seeking proposals from qualified consultants to conduct a comprehensive HR, classification, and compensation plans study and analysis.

The City employs full-time employees in unique job classifications. The City of MADEIRA BEACH operates under a Council/Manager form of government.

BACKGROUND:

The City employs full-time and part-time employees in unique job classifications. The City of Madeira Beach operates under a Council/Manager form of government.

SCOPE OF SERVICES:

The study shall evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. The consultant shall perform or provide the following:

- a) Review and evaluate Human Resources/Personnel processes relative to all City job classifications and compensation.
- b) Review and evaluate all current job classifications to ensure compliance with federal, state, and local laws and regulations including the Fair Labor Standards Act, exempt/non-exempt classifications, and all other applicable personnel provisions.
- c) Review all current job classifications, confirm, and recommend changes to hierarchical order of jobs using your evaluation system.
- d) Establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers).
- e) Identify potential pay compression issues and provide potential solutions.
- f) Analyze and recommend changes to the present compensation matrix and/or structure to meet the market analysis. This recommendation may include recommendations for individual positions as well.

CITY RESOURCES

The City will provide copies of all pay ranges, job classifications, previous studies and any other available in-house information requested by the selected consultant that may be required to complete the study.

COST PROPOSAL

This request for information does not, under any circumstance, commit the City to pay any costs incurred by any proposer in the submission of qualifications. The proposer is responsible for all costs associated with response to this request.

PART C:**PROPOSAL RESPONSE REQUIREMENTS**

1. *The total number of pages in the proposal shall not exceed 15 pages.*
2. Prepare a brief introduction including a general demonstration of understanding of the scope and complexity of the required work as well as:

Company Name: _____

Address: _____

Phone #: _____

Email Address: _____

Name of Authorized Representative: _____

1. **Introduction** – On a cover sheet to the proposal, provide the official name, address, phone number and fax number of the applicant, as well as the name of the principal contact person and the name of the person authorized to execute the contract.
2. **Experience and Qualifications** –
 - a. A brief description of the experiences and qualifications.
 - b. Listing and bios of proposed staff member(s) who will be performing the services.
 - c. A brief description of the organization.
 - d. A list of cities for which the consultant has conducted the comprehensive classification and compensation studies (within the past five years).
 - e. A list of three recent client references, including telephone numbers, email addresses, and addresses.
3. **Approach/Methods Used to perform the Project** – Detailed description of the services and methods by which the work set forth in the RFP will be performed. The description shall include the following items:
 - a. Proposer’s understanding of the services to be provided.
 - b. Complete methodology to be used in determining benchmark positions, other cities and counties to include in the survey, and determining salary ranges.
 - c. Description of the system you utilize to determine internal equity.
 - d. Description/philosophy in determining market rates and how that relates to individual classification and what connection that might be to the pay table. Also, provide a description on how you determine minimums and maximums on the pay table.
 - e. Estimated time the project will take from beginning to completion date.
4. **Cost Proposal** – This section should contain a complete breakdown of all costs relating to the content of the proposal, including the maximized total cost, as well as an itemized breakdown of the compensation required to accomplish the full performance of all tasks outlined in the proposal. Upon selection, it is expected that the consultant will make a minimum of 2 visits to

City of Madeira Beach

RFP 24-01

the City. One to kick off the project to include meetings with staff to discuss issues and a meeting to present findings to the Civil Service Commission, the Board of Commissioners, the City Manager, and select staff.

- 5. **Materials to Submit** – Interested firms must submit eight copies of their proposal and one copy (USB – PDF Format). All bid proposals must be submitted in person or by mail to the Attention of the City Manager no later than Friday, February 9, 2024, at 3:00 p.m., at which time the sealed bid proposals will be opened in a public meeting for that purpose. ALL bid proposals must be clearly marked “SEALED” outside the package. The address to submit the seal bid proposals:

City of Madeira Beach
 Attention: Robin I. Gomez, City Manager
 300 Municipal Drive
 Madeira Beach, FL 33777

- 6. **Review Process** – The City of MADEIRA BEACH reserves the right to reject any or all submittals. The City may request one or more firms to provide a detailed proposal.

7. **References:**

(A) Name of Entity: _____
 Nature of Services Provided: _____

Contact Name: _____
 Contact Phone Number: _____

(B) Name of Entity: _____
 Nature of Services Provided: _____

Contact Name: _____
 Contact Phone Number: _____

(C) Name of Entity: _____
 Nature of Services Provided: _____

Contact Name: _____
 Contact Phone Number: _____

COMPLIANCE WITH ALL APPLICABLE LAWS

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by _____

[print individual's name and title]

_____ for _____

[print name of entity submitting sworn statement]

whose business address is: _____ and _____ (if applicable) its Federal Employer Identification Number (FEIN) is ____ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement:

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

- (i) the dangers of drug abuse in the workplace.
- (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
- (iii) any available drug counseling, rehabilitation, and employee assistance programs; and

City of Madeira Beach

RFP 24-01

- (iv) the penalties that may be imposed upon employees for drug abuse violations.
- (2) Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).
- (3) Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:
 - (i) abide by the terms of the statement; and
 - (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.
- (4) Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.
- (5) Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.
- (6) Making a good faith effort to continue to maintain a drug free workplace through implementation of sections
 - (1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

- (1) Such person or entity has made false certification.
- (2) Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or
- (3) Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: _____

Title: _____

Company: _____

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF _____

Sworn to and subscribed before me this _____ day of _____, 2024.

by _____ who

is personally known to me OR Produced identification

_____ [type of

identification] My commission expires _____

Notary Public Signature

[Print, type or stamp Commissioned name of Notary Public]

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer’s Agent

Title

Printed Name

Date
