

**A Proposal to Conduct an Employee
Classification and Wage Study
for Webb County, TX
RFP #2018-006**

ORIGINAL



Evergreen Solutions, LLC

August 8, 2018

**A Proposal to Conduct an Employee
Classification and Wage Study
for Webb County, TX
RFP #2018-006**

Submitted to:

Mr. Juan Guerrero
Contract Administrator
Webb County
1110 Washington Street, Suite 101
Laredo, Texas 78040

Submitted by:



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

August 8, 2018



Evergreen Solutions, LLC

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

August 7, 2018

Mr. Juan Guerrero
Contract Administrator
Webb County
1110 Washington Street, Suite 101
Laredo, Texas 78040

Dear Mr. Guerrero:

Evergreen Solutions, LLC is pleased to submit this proposal to conduct an Employee Classification and Wage Study for Webb County. Our response is based on our review of your Request for Proposals (RFP #2018-006), our understanding of the Texas labor market, our experience working hundreds of local governments and public sector organizations, and our knowledge of best practices in human resources management.

Evergreen Solutions was formed to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen Solutions is a female-owned business, certified as a W/MBE in many states and municipalities across the country. Evergreen is licensed to transact business in the State of Texas (#32059488299).

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 45 states, including many clients in the State of Texas. For example, Evergreen has worked with, or is currently on contract to work with, the following public sector organizations in various human resource capacities: City of Rowlett; City of Seguin; City of Buda; City of Amarillo; City of Farmers Branch; City of Mont Belvieu; City of Pearland; City of Conroe; City of Athens; City of Fate; City of Sachse; City of Temple; City of Gonzales; City of Duncanville; City of Pflugerville; City of Fredericksburg; City of Austin; City of Sunset Valley; Ft. Bend County; Denton County; Travis County; Town of Little Elm; Dallas Area Rapid Transit; Texas City Management Association; Brazos River Authority; Bexar Metropolitan Water District; Denton County Fresh Water Supply District; Barton Springs/Edwards Aquifer Conservation District; South Texas College; Tarrant County College District; Sul Ross State University; Lone Star College System; El Paso Community College District; Midwestern State University; Austin Community College; Sam Houston State University; and Texas Legislative Budget Board.

Outside of Texas, our consultant team has worked with, or is currently on contract to work, the following local governments in providing work similar in scope to the services being requested: City of Santa Fe, NM; City of Carlsbad, NM; City of Page, AZ; Town of Sahuarita, AZ; City of Manitou Springs, CO; City of Fountain, CO; Ouray County, CO; City of Albany, OR; City of Broken Arrow, OK; City of Lee's Summit, MO; City of Branson, MO; City of Columbia, MO; Clay County, MO; Jefferson County, MO; St. Charles County, MO; Sedgwick County, KS; Kent County Levy Court, DE; City of Hyattsville, MD; City of Annapolis, MD; City of Westminster, MD; Washington County, MD; Allegany County, MD; County of Culpeper, VA; County of York, VA; Gloucester County, VA; King George County, VA; Louisa County, VA; Isle of Wight County, VA; Essex County, VA; Spotsylvania County, VA; Montgomery County, VA; James City County, VA; Prince George County, VA; Surry County, VA; Loudoun County, VA; Alleghany County, VA; City of Newport News, VA; City of Williamsburg, VA; City of Fredericksburg, VA; City of Covington, VA; City of Suffolk, VA; Union County, NC; New Hanover County, NC; Buncombe County, NC; Guilford County, NC; Gaston County, NC; City of Conway, SC; City of Lancaster, SC; City of Columbia, SC; City of Chester, SC; City of Goose Creek, SC; City of Mauldin, SC; Charleston County, SC; Berkeley County; Dorchester County, SC; Town of Moncks Corner, SC; Town of Hilton Head Island, SC; Blount County, TN; Mahoning County, OH; City of Bloomington, IN; City of Pittsburgh, PA; County of Montgomery, PA; City of Kingsland, GA; City of Alpharetta, GA; City of Douglasville, GA; City of Savannah, GA; City of Statesboro, GA; City of Chamblee, GA; City of Garden City, GA; City of Dahlonega, GA; City of Brookhaven, GA; City of Roswell, GA; City of Stockbridge,

GA; City of Dublin, GA; City of Fayetteville, GA; City of Tybee Island, GA; City of Dunwoody, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Cherokee County, GA; City of Foley, AL; City of Sarasota, FL; City of Palm Beach Gardens, FL; City of Sunrise, FL; City of Coral Springs, FL; City of Daytona Beach, FL; City of Orange City, FL; City of Doral, FL; City of Hollywood, FL; City of Ft. Myers, FL; City of West Melbourne, FL; City of Dania Beach, FL; Miami-Dade County, FL; Manatee County, FL; Seminole County, FL; Martin County, FL; Monroe County, FL; Palm Beach County, FL; Pinellas County, FL; Charlotte County, FL; Santa Rosa County, FL; Alachua County, FL; Sarasota County, FL; and many others. The services provided to some of these clients as they relate to the services being requested can be found in **Section 1** of our proposal.

The Evergreen Team is able to fully comprehend the challenges and goals of Webb County because of our vast understanding of public sector human resources, and the fact that we possess the necessary experience and expertise. Our team has significant expertise in conducting employee classification and wage studies and similar human resources work for public sector organizations, as evidenced in **Section 1**. Detailed resumes are available upon request.

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

Through our experiences in conducting this wide range of projects, we have gained the knowledge of every aspect of the management, and operations involved in public sector human resources management. As a result, our team knows how critical a classification and compensation system is to the overall operation of a proficient and progressive municipality. We have developed helpful methods and tools that assist clients in implementing and maintaining our study recommendations.

Evergreen's approach to conducting an employee classification and wage study draws not only from extensive human resources work with public sector clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, County administrators, department heads, and staff should be involved in each step of the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.
- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web. Further, our web-based **JobForce Manager** tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.
- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As Executive Vice-President of Evergreen Solutions, LLC, I am authorized to commit our firm contractually to this assignment. Attached are the required forms.

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

Sincerely,


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



Webb County Purchasing

Bid Information

Bid Owner Mr. Juan Guerrero Contract Administrator
Email juguerrero@webbcountytx.gov
Phone (956) 523-4149 x
Fax
Bid Number RFP 2018-006 Employee Classification & Wage Study
Title
Bid Type RFP
Issue Date 07/19/2018
Close Date 8/8/2018 03:00:00 PM (CT)

Contact Information

Address 1110 Washington St. Suite 101 Laredo, TX 78040
Contact Mr. Juan Guerrero Contract Administrator
Department
Building
Floor/Room
Telephone (956) 523-4149 x
Fax
Email juguerrero@webbcountytx.gov

Ship to Information

Address
Contact
Department
Building
Floor/Room
Telephone
Fax
Email

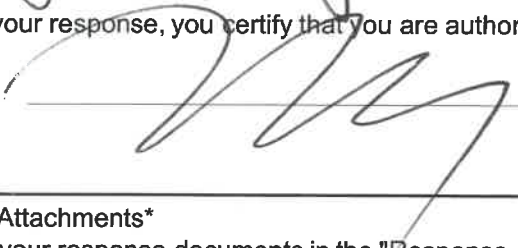
Supplier Information

Company Name Evergreen Solutions
Contact Name Dr. Jeff Ling
Address 2878 Remington Green Circle Tallahassee, FL 32308
Telephone (850) 383-0111
Fax (850) 383-1511
Email jeff@consultevergreen.com

Supplier Notes

By submitting your response, you certify that you are authorized to represent and bind your company.

Signature



Date 8/7/18

Bid Notes

Download All Attachments

Please upload your response documents in the "Response Attachments" tab.

Bid Activities

Bid Messages

Bid Attachments

The following attachments are associated with this opportunity and will need to be retrieved separately

#	Filename	Description
Header	RFP 2018-006 Employee Classification and Wage Study.pdf	RFP 2018-006
Header	PLAN B PAY SCALE.pdf	Plan B Pay Scale
Header	General Affidavit Purchasing Ethics.pdf	Affidavit
Header	Additional Forms.pdf	Additional Forms

Bid Attachments Requested

The following attachments are requested with this opportunity

Bid Attributes

Please review the following and respond where necessary

THIS FORM MUST BE INCLUDED WITH RFP PACKAGE; PLEASE CHECK OFF EACH ITEM INCLUDED WITH RFP PACKAGE AND SIGN BELOW TO CONFIRM SUBMITTAL OF EACH REQUIRED ITEM.

RFP # 2018-006

"Employee Classification and Wage Study"

Proposer Information

A minimum of five (5) references

Conflict of Interest form (Form CIQ)

Certification regarding Debarment (Form H2048)

Certification regarding Federal lobbying (Form 2049)

Code of Ethics Affidavit

Proof of No Delinquent Tax Owed to Webb County



Proposer Information

Name of Company: Evergreen Solutions, LLC
Address: 2878 Remington Green Cir.
City and State: Tallahassee, FL
Phone: (850) 383-0111
Email Address: jeff@consultevergreen.com

Signature of Person Authorized to Sign:

[Handwritten Signature]
Signature
Dr. Jeff King
Print Name
Exec. Vice President
Title

Indicate status as to "Partnership", "Corporation", "Land Owner", etc.

Partnership
8/7/18
(Date)

Note:

All submissions relative to these RFP shall become the property of Webb County and are nonreturnable.

If any further information is required, please call the Webb County Contract Administrator, Juan Guerrero, at (956)523-4125.

References

Name of Local / State government or private company	Address	Phone	Name of Contact	Contract Active, if not when did it expire (If applicable)
Ft. Bend County, TX	301 Jackson, Suite 243, Richmond, TX 77469	(281) 341-8619	Lewis Entricht	7/29/16
City of Farmers Branch, TX	13000 William Dodson Parkway, Farmers Branch, TX 75234	(972) 919-2552	Brian Beasley	9/6/16
Brazos River Authority, TX	4600 Cobbs Drive, Waco, TX 76710	(254) 761-3104	Monica Wheelis	4/5/18
Berkeley County, SC	1003 Highway 52, Moncks Corner, SC 29461	(843) 719-4163	Denise Mitchum	11/30/16
Loudoun County, VA	1 Harrison Street, S.E., 4 th Floor, Leesburg, VA 20177	(703) 777-0213	Jeanette Green	8/22/17 (We have an active contract with the County for a phase II study).
Gaston County, NC	128 W. Main Avenue, Gastonia, NC 28052	(704) 866-3722	Pam Overcash	11/18/16

***We chose these references due to the similar scope and size to that of Webb County.**

**WEBB COUNTY PURCHASING DEPT.
QUALIFIED PARTICIPATING VENDOR CODE OF ETHICS
AFFIDAVIT FORM**

STATE OF TEXAS *

KNOW ALL MEN BY THESE PRESENTS:

COUNTY OF WEBB *

BEFORE ME the undersigned Notary Public, appeared Dr. Jeff King
the herein-named "Affiant", who is a resident of Leon County, State
of Florida and upon his/her respective oath, either individually and/or behalf of their
respective company/entity, do hereby state that I have personal knowledge of the following facts,
statements, matters, and/or other matters set forth herein are true and correct to the best of my
knowledge.

*I personally, and/or in my respective authority/capacity on behalf of my company/entity do hereby
confirm that I have reviewed and agree to fully comply with all the terms, duties, ethical policy
obligations and/or conditions as required to be a qualified participating vendor with Webb
County, Texas as set forth in the Webb County Purchasing Code of Ethics Policy posted at the
following address: <http://www.webbcountytx.gov/PurchasingAgent/PurchasingEthicsPolicy.pdf>*

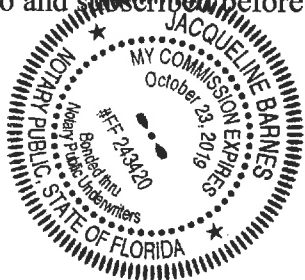
*I personally, and/or in my respective authority/capacity on behalf of my company/entity do hereby
further acknowledge, agree and understand that as a participating vendor with Webb County,
Texas on any active solicitation/proposal/qualification that I and/or my company/entity failure to
comply with the Code of Ethics policy may result in my and/or my company/entity disqualification,
debarment or make void my contract awarded to me, my company/entity by Webb County. I agree
to communicate with the Purchasing Agent or his designees should I have questions or concerns
regarding this policy to ensure full compliance by contacting the Webb County Purchasing Dept.
via telephone at (956) 523-4125 or e-mail to the Webb County Purchasing Agent to
joel@webbcountytx.gov.*

Executed and dated this 7th day of August, 2018.

Signature of Affiant

Dr. Jeff King / Evergreen Solutions, LLC
Printed Name of Affiant/Company/Entity

SWORN to and subscribed before me, this 7th day August, 2018



Jacqueline Barnes
NOTARY PUBLIC, STATE OF TEXAS

Florida

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

OFFICE USE ONLY

Date Received

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

1 Name of vendor who has a business relationship with local governmental entity.

*

2 Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

8/7/18

Date

* Evergreen doesn't have a conflict of interest

CERTIFICATION
REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY
EXCLUSION FOR COVERED CONTRACTS

PART A.

Federal Executive Orders 12549 and 12689 require the Texas Department of Agriculture (TDA) to screen each covered potential contractor to determine whether each has a right to obtain a contract in accordance with federal regulations on debarment, suspension, ineligibility, and voluntary exclusion. Each covered contractor must also screen each of its covered subcontractors.

In this certification "contractor" refers to both contractor and subcontractor; "contract" refers to both contract and subcontract.

By signing and submitting this certification the potential contractor accepts the following terms:

1. The certification herein below is a material representation of fact upon which reliance was placed when this contract was entered into. If it is later determined that the potential contractor knowingly rendered an erroneous certification, in addition to other remedies available to the federal government, the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, or the TDA may pursue available remedies, including suspension and/or debarment.
2. The potential contractor will provide immediate written notice to the person to which this certification is submitted if at any time the potential contractor learns that the certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
3. The words "covered contract", "debarred", "suspended", "ineligible", "participant", "person", "principal", "proposal", and "voluntarily excluded", as used in this certification have meanings based upon materials in the Definitions and Coverage sections of federal rules implementing Executive Order 12549. Usage is as defined in the attachment.
4. The potential contractor agrees by submitting this certification that, should the proposed covered contract be entered into, it will not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the Department of Health and Human Services, United States Department of Agriculture or other federal department or agency, and/or the TDA, as applicable.

Do you have or do you anticipate having subcontractors under this proposed contract?

Yes

No

5. The potential contractor further agrees by submitting this certification that it will include this certification titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion for Covered Contracts" without modification, in all covered subcontracts and in solicitations for all covered subcontracts.
6. A contractor may rely upon a certification of a potential subcontractor that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered contract, unless it knows that the certification is erroneous. A contractor must, at a minimum, obtain certifications from its covered subcontractors upon each subcontract's initiation and upon each renewal.
7. Nothing contained in all the foregoing will be construed to require establishment of a system of records in order to render in good faith the certification required by this certification document. The knowledge and information of a contractor is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
8. Except for contracts authorized under paragraph 4 of these terms, if a contractor in a covered contract knowingly enters into a covered subcontract with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, Department of Health and Human Services, United States Department of Agriculture, or other federal department or agency, as applicable, and/or the TDA may pursue available remedies, including suspension and/or debarment.

PART B. CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION FOR COVERED CONTRACTS

Indicate in the appropriate box which statement applies to the covered potential contractor:

- The potential contractor certifies, by submission of this certification, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this contract by any federal department or agency or by the State of Texas.
- The potential contractor is unable to certify to one or more of the terms in this certification. In this instance, the potential contractor must attach an explanation for each of the above terms to which he is unable to make certification. Attach the explanation(s) to this certification.

Name of Contractor	Vendor ID No. or Social Security No.	Program No.
<i>Wingreen Solutions</i>	<i>20-1833438</i> FEIN	

Signature of Authorized Representative

8/7/10
Date

Dr. Jeff King, Exec. Vice President
Printed/Typed Name and Title of Authorized Representative

CERTIFICATION REGARDING FEDERAL LOBBYING
(Certification for Contracts, Grants, Loans, and Cooperative Agreements)

PART A. PREAMBLE

Federal legislation, Section 319 of Public Law 101-121 generally prohibits entities from using federally appropriated funds to lobby the executive or legislative branches of the federal government. Section 319 specifically requires disclosure of certain lobbying activities. A federal government-wide rule, "New Restrictions on Lobbying", published in the Federal Register, February 26, 1990, requires certification and disclosure in specific instances.

PART B. CERTIFICATION

This certification applies only to the instant federal action for which the certification is being obtained and is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No federally appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, or the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with these federally funded contract, subcontract, subgrant, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions. (If needed, contact the Texas Department of Agriculture to obtain a copy of Standard Form-LLL.)

3. The undersigned shall require that the language of this certification be included in the award documents for all covered subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all covered subrecipients will certify and disclose accordingly.

Do you have or do you anticipate having covered subawards under this transaction?

- Yes
 No

Name of Contractor/Potential Contractor	Vendor ID No. or Social Security No.	Program No.
Evergreen Solutions	201833438	

Name of Authorized Representative	Title
Dr. Jeff Long	Exec. Vice-President

Signature - Authorized Representative

8/7/18
Date

PROOF OF NO DELINQUENT TAXES OWED TO WEBB COUNTY

Name Dr. Jeff King owes no delinquent property taxes to Webb County.

Evergreen Solutions owes no property taxes as a business in Webb County.
(Business Name)

Dr. Jeff King owes no property taxes as a resident of Webb County.
(Business Owner)

Kelly Under
Person who can attest to the above information

*** SIGNED NOTORIZED DOCUMENT AND PROOF OF NO DELINQUENT TAXES TO WEBB COUNTY.**

The State of Texas
County of Webb

Before me, a Notary Public, on this day personally appeared Dr. Jeff King, know to me (or proved to me on the oath of Evergreen Solutions to be the person whose name is subscribed to the forgoing instrument and acknowledged to me that he executed the same for the purpose and consideration therein expressed.

Given under my hand and seal of office this 7th day of August 2018.

Notary Public, State of Texas

Jacqueline Barnes

(Print name of Notary Public here)

My commission expires the 23rd day of October 2019.

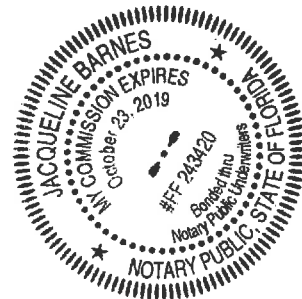


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Section 1.0

*Description of Relevant Experience and
Qualifications*



1.0 Description of Relevant Experience and Qualifications

Evergreen Solutions is well qualified to conduct an Employee Classification and Wage Study for Webb County as we have conducted hundreds of similar studies for local governments and other public sector organizations throughout the country, including many within the State of Texas. In this section we provide our firm's history and background, a list of similar projects we have conducted or are currently on contract to conduct, and the qualifications of our proposed project team.

1.1 Firm's History and Background

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

Evergreen Solutions was formed in 2004 provide a modern, practical alternative to the typical consulting options. The firm is made up of management and information technology professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Evergreen is a limited liability company that a certified as a W/MBE in many states and municipalities throughout the country. Evergreen is authorized to transact business in the State of Texas (#32059488299). Evergreen employs 14 full-time staff.

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 wage studies; salary and benefits surveys; classification studies; performance appraisal reviews; workload analyses; staffing studies; disparity studies; training assessments; and strategic planning.

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



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



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

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting employee classification and wage studies for local governments and other public sector organizations throughout the country, including many within the State of Texas;
- comprehensive experience in all components vital to the successful completion of this engagement;
- knowledge of relevant Texas statutes and regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 45 states throughout the country.

Exhibit 1-1 includes a list of the public sector clients in the State of Texas that our consultant team has worked with, or is currently in contract to work with, in providing work similar in scope to the services being requested by Webb County.

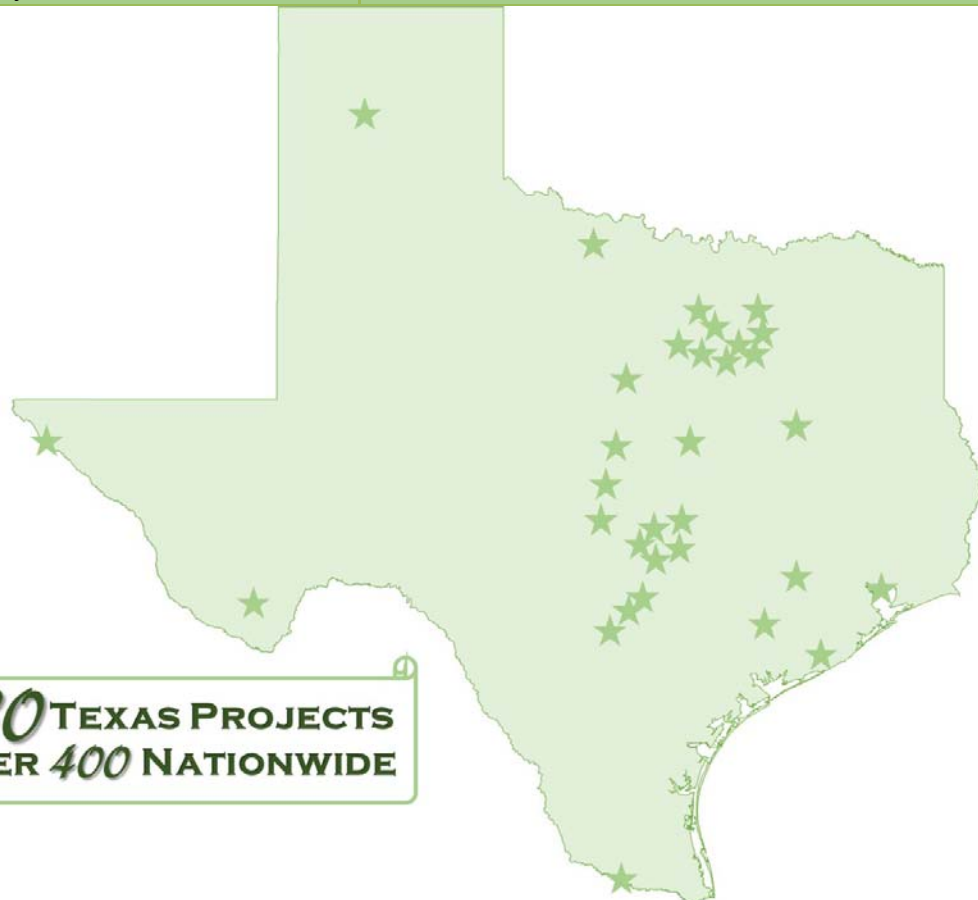
In addition to our Texas clients, **Exhibit 1-2** includes a list of some of the local governments outside of Texas that our consultant team has worked with, or is currently in contract to work with, that involved work similar in scope to the services being requested by Webb County.



Texas

Exhibit 1-1: Public Sector Human Resource Clients

• City of Athens	• Denton County
• City of Rowlett	• Travis County
• City of Conroe	• Town of Little Elm
• City of Mont Belvieu	• Dallas Area Rapid Transit
• City of Pflugerville	• Barton Springs/Edwards Aquifer Conservation District
• City of Farmers Branch	• Bexar Metropolitan Water District
• City of Fate	• Brazos River Authority
• City of Sunset Valley	• Denton County Fresh Water Supply District
• City of Seguin	• Austin Community College
• City of Pearland	• El Paso Community College District
• City of Sachse	• Tarrant County Community College District
• City of Duncanville	• Lone Star College System
• City of Buda	• South Texas College
• City of Fredericksburg	• Sul Ross State University
• City of Amarillo	• Midwestern State University
• City of Gonzales	• Texas City Management Association
• City of Temple	• Sam Houston State University
• Ft. Bend County	



**OVER 30 TEXAS PROJECTS
AND OVER 400 NATIONWIDE**



Exhibit 1-2
Select Local Government Clients Outside of Texas

Town of Colchester, VT	City of Manitou Springs, CO	City of Sunrise, FL
Blount County, TN	Ouray County, CO	City of Ft. Myers, FL
City of Bloomington, IN	City of Fountain, CO	City of Largo, FL
Mahoning County, OH	City of Carlsbad, NM	City of Hollywood, FL
Jefferson County, MO	City of Santa Fe, NM	City of Winter Park, FL
City of Branson, MO	City of Tucson/Pima County, AZ	City of Key West, FL
City of Lee's Summit, MO	City of Page, AZ	City of Sunny Isles Beach, FL
St. Charles County, MO	Town of Sahuarita, AZ	City of Punta Gorda, FL
Sedgwick County, KS	City of Stockbridge, GA	City of Deltona, FL
City of Broken Arrow, OK	City of Savannah, GA	City of Kissimmee, FL
City of Pittsburgh, PA	City of Fayetteville, GA	City of Cape Coral, FL
County of Montgomery, PA	City of Kingsland, GA	City of St. Cloud, FL
Buncombe County, NC	City of Alpharetta, GA	City of Bartow, FL
Guilford County, NC	City of Douglasville, GA	City of Temple Terrace, FL
New Hanover County, NC	City of Garden City, GA	City of Doral, FL
Gaston County, NC	City of Dahlonega, GA	City of Daytona Beach, FL
Union County, NC	City of Brookhaven, GA	City of Lake City, FL
Lee and Davie County, NC	City of Tybee Island, GA	City of West Melbourne, FL
Alleghany County, MD	City of Statesboro, GA	Palm Beach County, FL
Washington County, MD	City of Roswell, GA	Santa Rosa County, FL
City of Hyattsville, MD	City of Chamblee, GA	Alachua County, FL
City of Annapolis, MD	City of Dublin, GA	Highlands County, FL
Kent County Levy Court, DE	City of Stockbridge, GA	Bay County, FL
Montgomery County, VA	Douglas County, GA	Manatee County, FL
Gloucester County, VA	Lumpkin County, GA	Miami-Dade County, FL
County of Culpeper, VA	Forsyth County, GA	Martin County, FL
County of York, VA	Cherokee County, GA	Sumter County, FL
Louisa County, VA	City of Foley, AL	Seminole County, FL
Essex County, VA	City of Panama City, FL	Gadsden County, FL
Spotsylvania County, VA	City of Panama City Beach, FL	Monroe County, FL
King George County, VA	City of Fort Walton Beach, FL	Charlotte County, FL
Isle of Wight County, VA	City of Gainesville, FL	Citrus County, FL
City of Suffolk, VA	City of Winter Park, FL	Osceola County, FL
City of Fredericksburg, VA	City of Palm Beach Gardens, FL	Hernando County, FL
City of Covington, VA	City of Dania Beach, FL	Sarasota County, FL
City of Williamsburg, VA	City of Destin, FL	Gulf County, FL
City of Lancaster, SC	City of Ocala, FL	Pinellas County, FL
City of Chester, SC	City of Coral Springs, FL	Village of Pinecrest, FL
City of Mauldin, SC	City of North Miami Beach FL	Village of North Palm Beach, FL
City of Columbia, SC	City of Plantation, FL	Town of Juno Beach, FL
Charleston County, SC	City of Maitland, FL	Town of Cutler Bay, FL
Berkeley County, SC	City of Holmes Beach, FL	Town of Palm Beach, FL
Town of Mount Pleasant, SC	City of St. Petersburg, FL	Town of Jupiter, FL
Town of Hilton Head Island, SC	City of Sarasota, FL	Town of Ponce Inlet, FL
Town of Monks Corner, SC	City of Clermont, FL	Town of Davie, FL



1.2 Select Relevant Experience

Because Evergreen has conducted hundreds of classification and compensation studies throughout the country, we include in this section our local government work as well as our public sector work in the State of Texas as it relates to the services being requested by Webb County.

Employee Compensation Consulting Services Ft. Bend County, Texas

Evergreen was retained by Fort Bend County to provide employee compensation consulting services. Evergreen conducted the following tasks:

- reviewed current compensation plan including policy groups and salary structures;
- conducted Fair Labor Standards Act (FLSA) exempt/non-exempt status review of all positions;
- analyzed internal equity and possible compression issues;
- completed salary survey of City and County governments in the State of Texas as designated by the County;
- designed and executed a salary survey, analyzed results and made recommendations; and
- evaluated and determined each employee's proper step placement on the newly approved salary grade structure.



Compensation, Classification, and Benefits Study Denton County, Texas

Evergreen Solutions conducted a Comprehensive Compensation, Classification and Benefits Study for the more than 1,550 employees of Denton County. The County had not performed a comprehensive classification and compensation study in 15 years. Evergreen consultants conducted employee orientations, focus groups and interviews, and conducted job analysis of all included positions. This information was used to create an internal equity alignment that is consistent with current job duties and responsibilities. As part of the project, Evergreen conducted a comprehensive salary and benefits survey of local and regional labor market peers to properly assess the County's competitive position for wages and benefits. Evergreen provided customized and detailed recommendations for adjusting the County's compensation and classification structures based on internal and external equity. Implementation options that were equitable and cost efficient were developed and additional recommendations for maintaining the system over time were also provided. Additionally, revised classification descriptions with FLSA determinations were provided.



**Compensation Analysis
Travis County, Texas**

Evergreen Solutions assisted the Travis County Human Resources Department in determining the appropriate pay levels for all non-sheriff's office law enforcement personnel. Classifications reviewed included all Constable positions, Park Ranger positions and Investigators and Investigator Lieutenants in the County's Attorney's Office and District Attorney's Office. Evergreen consultants conducted a preliminary review of the current compensation structure, met with County departments to discuss compensation issues, analyzed existing market data, and conducted an analysis of the internal equity relationships between the respective law enforcement agencies and similar positions residing within the Travis County Sheriff's Office. As a result of the study, Evergreen presented the County with recommendations for changes to the County's non-TCSO pay scale, classification changes, and a three-year implementation plan to bring non-TCSO jobs into proper alignment with TCSO positions. The study solidified internal equity relationships while ensuring the County was competitive with current market conditions.



**Comprehensive Compensation and Benefits Study
City of Rowlett, Texas**

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include "on call" pay. Evergreen's consultants identified any weaknesses within the components of the City's existing compensation package that would negatively impact the organization's ability to attract and retain talented employees.



**Classification and Compensation Study
City of Seguin, Texas**

Evergreen Solutions was hired to assist the City of Seguin in designing and implementing a comprehensive classification and compensation plan for its workforce of 330 full-time employees. The scope of the project included two major components: (1) Working with a City management team to revise the existing pay plan and structures; and (2) Evaluating current salary structure and compensation levels for all regular, classified positions and recommending appropriate adjustments. Specifically, Evergreen's consultants reviewed the City's current classification/compensation plan; surveyed management and identified problem areas regarding the classification and compensation system; conducted a salary survey to ensure external equity; reviewed current policies and procedures; reviewed salary structure to determine appropriateness; and provided technical assistance and training to City



staff to facilitate the implementation and the maintenance of the recommended system and procedures.



**Pay Structure Study
City of Fate, Texas**

Evergreen was hired to develop a new pay plan for the City of Fate. Evergreen performed the following tasks: reviewed the City's salary data; created a new pay plan for the City; slotted current jobs into the new pay plan; and verified the internal equity of the new pay plan.



**Comprehensive Compensation and Benefits Study
City of Sachse, Texas**

Evergreen Solutions was hired by the City of Sachse to conduct a Comprehensive Compensation and Benefits Study. The study measured and provided an analysis on base salary, pay/step plans, employer-provided medical benefits packages and any other incentive-based compensation options, including "on call" pay. To ensure the project's validity and applicability, Evergreen conducted a compensation analysis using similar-sized local municipalities for comparison and recommended comparator cities for consideration.

The following study components were compared:

- pay ranges with comparator cities performing the same or similar functions;
- actual employee pay with comparator cities performing the same or similar functions;
- pay/step plans/special assignment pay with comparator cities performing the same or similar functions; and
- city-provided comprehensive employee benefits packages with comparator cities performing the same or similar functions.

Evergreen recommended pay structure features that provided opportunities for advancement while minimizing salary overlap between levels of responsibility.

Note: Evergreen was again hired in 2016 to conduct a classification study for select positions.



Classification and Compensation Study City of Pflugerville, Texas

Evergreen Solutions was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman). Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost analysis for positions that would require adjustments.

Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1st and 3rd quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval.



Job Classification, Salary Survey, Compensation Plan Study Services City of Duncanville, Texas

Evergreen Solutions was engaged with the City of Duncanville to provide professional Job Classification, Salary Survey, and Compensation Pay Plan Study Services that allowed the creation of a comprehensive job classification and compensation system and pay plans for employees within the City. Evergreen's consultants reviewed and analyzed the City's current structure and practices of job classifications and job descriptions including: conducting orientation sessions; providing questionnaires; conducting management and employee interviews; reviewing questionnaire responses with supervisory and management staff; performing a job analysis; and developing and/or revising job descriptions.

Evergreen prepared a customized market survey of salaries of the local and area municipalities that included all of the competitive markets where the city recruited employees. Evergreen established a system for an ongoing and easily understood maintenance of the new, or updated, pay plan that was easy for employees to understand and for managers to administer. The recommended pay plan effectively balanced market and internal equity, supported the classification system, and promoted an employee's perception of organizational fairness and equity in the City.



**Pay and Classification Study
City of Fredericksburg, Texas**

Evergreen Solutions was engaged with the City of Fredericksburg to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, Evergreen consultants conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen consultants also conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive pay plan.



**Classification/Compensation Plan Update (Included Review of Performance Appraisal System)
City of Temple, Texas**

Evergreen Solutions was engaged with the City of Temple to update the City's Classification/Compensation Plan for its 837 full- and part-time employees. Evergreen reviewed and updated the City's general government classification system and completed a market update to its compensation system. The goals and objectives of the study were to:

- develop a classification system that allows for competitive and equitable compensation, both internally and as compared to our peer cities;
- develop a classification system that accurately reflects the value we place on employees, resulting in a more engaged workforce and a reduction in turnover;
- develop a classification system that recommends processes for movement through the salary scale in the future; including a process for implementing salary adjustments based on experience and/or education gained while in the current position;
- conduct a compensation market review and update which includes base pay as well as other compensation (e.g. car allowances, incentive pays, certification pays); and
- provide a compensation market update will include all supplemental pay programs offered by peer cities including, but not limited to: longevity; deferred compensation; tuition reimbursement; assignment pay; on-call pay; bilingual pay; shift differential pay; take home vehicles; tool allowance; car allowance or use of city vehicle; uniform allowance or provide uniforms; uniform cleaning allowance; and certification/license pay.



Evergreen further reviewed the current performance appraisal system that took into account the unique nature of certain functions and responsibilities which were characteristic of certain jobs and departments in government and recommend any necessary improvements and developed any necessary performance tools.



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

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

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



**Classification and Compensation Study
City of Sunset Valley, Texas**

Evergreen Solutions was hired by the City of Sunset Valley to assist with a City-wide Compensation and Classification Study, as well as development of a Performance Evaluation System. The study also included a Human Resources Audit and recommendations to strategically align the processes, procedures, staffing, and organization of human resources functions. All employees and classifications in the City were included in the study. As part of the study, the Evergreen Team conducted interviews and focus groups with all City employees. Evergreen consultants conducted a comprehensive salary survey of local and regional employers



to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.



**Classification and Compensation Pay Plan
City of Amarillo, Texas**

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan. Evergreen's consultants: reviewed the City's existing classification/compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade.

In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.



**Compensation Market Review and Classification Study
City of Austin, Texas**

Evergreen Solutions was contracted to review the City of Austin's classification system for the Human Resources job family. The study's primary purpose was to review the City's classification structure for its human resources jobs and to ensure that all employees working in the human resources area were properly classified based upon the work they performed. To accomplish this purpose, Evergreen Solutions met with each Human Resources Manager and conducted extensive outreach sessions (desk audits) with a large percentage of human resources employees. In addition to the interviews and desk audits, Evergreen consultants reviewed Position Analysis Questionnaires (PAQs), job descriptions, organizational charts, and other documentation. The job analysis resulted in recommendations for a job hierarchy within the Human Resources family and the slotting of each individual within the proposed classification system. Evergreen consultants also worked with the Human Resources Department to ensure that the proposed classification system properly aligned with the compensation system. At the conclusion of the study, job descriptions were revised for each job and FLSA exempt status were provided for each job classification.



**Comprehensive Compensation and Classification Study
City of Farmers Branch, Texas**

Evergreen Solutions was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive.



**Classification and Compensation Study
City of Athens, Texas**

Evergreen Solutions was retained by the City of Athens to conduct a Classification and Compensation Study by revising and/or creating a job classification and compensation structure to ensure a fair and equitable system both internally and externally. Evergreen performed the following tasks: conducted job evaluations to establish and/or redefine grades/classifications groups and job relationships; Identified benchmark jobs from each grade/classification to survey; determined a relevant job market; conducted a customized market salary and benefit package survey for all classification groups; performed survey data analysis and recommended pay structures; and met with City Management and key staff to determine implementation strategies to present to the City Council.

In the end, Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



**Classification and Compensation Study
City of Conroe, Texas**

Evergreen Solutions is retained by the City of Conroe to conduct a Classification and Compensation Study. The scope of the study includes the following major components: review and update and/or rewrite of all city job descriptions; work with a City management team to revise the existing pay plan and structures; and evaluate current salary structure and compensation levels for all regular, classified positions, and recommend appropriate adjustments.



Classification and Compensation Study Town of Little Elm, Texas

Evergreen Solutions was retained by the Town of Little Elm to conduct compensation and classification study of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were also reviewed, as needed, and FLSA determinations will be made. The rank structure for police and fire department employees were reviewed against peer organizations to determine whether the current structure for each department is effective for its size. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity within the Town. Evergreen provided Town staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total compensation system would be accomplished.



City Management Compensation Survey Texas City Management Association

Evergreen Solutions is retained by the Texas City Management Association (TCMA) to conduct annual City Management Compensation Surveys. The surveys include actual salaries for city management positions as well as other compensation which were considered in the total compensation package (e.g., vehicle or housing allowances, deferred compensation, etc), the municipalities' geographic region, population of the municipality, number of FTEs, total operating budget, etc.

Evergreen will provide TCMA with an overall survey response rate of approximately 70%, response rates by organization characteristics, and a list of organizations that did not respond in order for TCMA representatives to follow-up with additional response requests. Evergreen will collect and enter survey results into Evergreen's electronic data analysis tools and provide TCMA with response rates by the organization's characteristics at the conclusion of the surveys. Evergreen will further create a secure database that will include the survey results and submit the results to TCMA for review and approval. Evergreen will finalize the database to allow TCMA membership to sort and filter the information obtained from the survey to extract subgroups of the data relevant to their specific needs. **Note:** Evergreen has already conducted two annual surveys.



Compensation and Classification Study Denton County Fresh Water Supply District, Texas

The Denton County Fresh Water Supply District No. 6 and Denton County Fresh Water Supply District No. 7 retained Evergreen Solutions to conduct a comprehensive compensation and classification study to determine whether the District possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally.



The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the District.



Compensation and Classification Plan Update Brazos River Authority, Texas

Evergreen Solutions was hired by the Brazos River Authority to conduct a Compensation and Classification Study update. Evergreen reviewed and recommended changes to the existing salary and wage schedule by assessing the strengths and weaknesses of the current pay structure, the internal equity of the pay system, the placement of all current staff members within their respective pay grades, and other pertinent factors (such as compression, turnover, and tenure that may influence current and future pay structures). The study was accomplished by interactions with Authority staff, data collection and analysis, and attaining familiarization of the organization's current compensation structure and the perceived or real compensation challenges and goals of the Authority.

Evergreen reviewed current FLSA non-exempt and exempt status of all positions and provided recommendations for necessary changes based upon primary job responsibilities and salary of each position and conducted a Statistical Pay Equity Analysis for gender equity and internal equity and made recommendations for necessary changes.

Evergreen consultants conducted a Salary and Benefits Survey to determine external competitiveness and recommend pay changes. This survey was accomplished by identifying benchmark jobs, identifying comparable groups such as governmental entities and other public and private employers in each region, performing statistical analysis showing market index and pay structures, and assigning benchmark jobs to the pay structure.

In the end, Evergreen provided recommendations and the rationale to support each recommendation, cost of implementing the proposed changes, and a description of ongoing administrative guidelines to maintain system consistency. Additionally, the report contained observations, analysis and recommendations that improved the overall effectiveness of attracting and retaining employees and managing external market factors.

Note: Evergreen was original hired in 2009 to conduct a comprehensive classification and compensation study. Most recently, Evergreen was hired by the Brazos River Authority to conduct Compensation and Classification Study Update as well as an Organizational Review of the Reservoir System Maintenance Unit (RSMU). This study was completed in April 2018.



**Salary and Benefits Survey
Bexar Metropolitan Water District, Texas**

The Bexar Metropolitan Water District (BexarMet) retained Evergreen Solutions to conduct a salary and benefits survey to determine if BexarMet was offering salaries and benefits that were within an appropriate competitive range. The study results provided BexarMet with recommendations related to external equity while still ensuring that internal equity was maintained.

The study included a review of the analysis conducted on the market data, recommendations based on the compensation structure, development of specific compensation recommendations, and creation of a strategic direction for BexarMet to use in implementing the proposed compensation system.

Evergreen Solutions was also awarded an add-on contract for Bexar to re-evaluate the FLSA designation of a selection of positions in the organization. FLSA designations were reviewed based on the current job descriptions and the Job Assessment Tool (JAT) responses of the incumbents.



**Comprehensive Classification and Compensation Study
Barton Springs/Edwards Aquifer Conservation District, Texas**

Evergreen Solutions is retained by the Barton Springs/Edwards Aquifer Conservation District to conduct a Comprehensive Classification and Compensation Analysis. Evergreen will conduct a review of the current classification and compensation system by conducting a job analysis, evaluating the current system, assessing job descriptions and recommending changes to the current system. In the end, Evergreen will provide recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Note: This project is nearing completion.



**Compensation Consultant Services
Dallas Area Rapid Transit, Texas**

Evergreen Solutions is retained by Dallas Area Rapid Transit (DART) to provide Compensation Consultant Services. DART is a public transportation agency providing an assortment of transportation services to thirteen (13) cities in the Dallas, Texas metroplex.

Evergreen will provide job evaluation information questionnaires and electronically create job descriptions or classifications from the provided information. Evergreen will update information into DART's job



description database system, and submit the updated job descriptions through its online workflow system. Evergreen will review, determine, and recommend revised rules, policies, and procedures in anticipation of and based on the proposed rule change regarding overtime compensation and will review all job descriptions and determine exempt or non-exempt status based on FLSA guidelines. Evergreen will also review and validate DART's career ladder program and make recommendations for any necessary modifications.

Upon approval of the job description review and update, Evergreen will make recommendations for a sustainable compensation system that will ensure recruitment and retention of a quality public sector transit workforce, based on compensation benchmarking with comparable mid-sized employers, and comparable mid-sized transit agencies in the Texas, Southern region, and national markets.



Compensation, Classification, and Performance Evaluation Study Tarrant County College District, Texas

Tarrant County College retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to determine whether the College possessed a compensation and classification system for its 1,253 non-faculty staff that was both equitable as compared to the external competitive employment market, and equitable internally. The District then hired Evergreen again to conduct a performance management study that supported the District's formalized system of performance evaluation of its personnel. The purpose of the evaluation was to provide feedback to employees about their work performance; assist employees in staff and professional development; identify employees' leadership qualities; and achieve the District's goals.

The objectives of the formal evaluation were to: ensure that the District was meeting its strategic goals in an efficient and timely manner; maintain or improve each employee's job satisfaction and morale by letting him/her know that the supervisor is interested in his/her job progress and personal development; serve as a systematic guide for supervisors in planning further training and development for each employee; assure formulation of a considered opinion of an employee's performance, and focus maximum attention on achievement of assigned duties; assist in determining and recording special talents, skills, and capabilities that might otherwise not be noticed or recognized; assist in planning personnel moves and placements that will best utilize each employee's capabilities and benefit the District; provide an opportunity for each employee to discuss job concerns and interests with his/her supervisor; and assemble substantiating data for use as a guide, although not necessarily the sole governing factor, for such purposes as wage adjustments, promotions, disciplinary action, and termination.



Compensation Study South Texas College

Evergreen Solutions was engaged with South Texas College to conduct a comprehensive compensation study. Evergreen designed and assisted with the implementation of a classification and compensation structure for the College's 733 non-faculty staff. The objective of the study was to optimize recruitment and retention of employees. Specifically, Evergreen's consultants:

- reviewed and updated current job descriptions as necessary, and made recommendations for new job descriptions in accordance with the duties each employee actually performs;
- conducted job evaluations to determine proper classification of a job internally and with the external market;
- compared non-faculty employee salaries to internal and external market(s) and made recommendations for salary adjustments to assure internal equity and external competitiveness within the relevant labor market;
- reviewed salary ranges to determine market entry pay levels and maximum salary for each salary range;
- reviewed pay structure and recommended appropriate reclassification;
- prepared an analysis that included a survey of wages for comparable college and private sector employees;
- recommended procedures for advancement within and between salary ranges resulting from transfers, career advancements, and/or educational attainment;
- reviewed current pay structure and developed pay ranges based on job analysis and market reference data;
- developed definitional guidelines for salary ranges, including hiring and promotion guidelines and salary adjustments due to educational attainment; and
- made recommendations for guidelines, methodology, and tools for appropriate classification within ranges and developed strategies for maintaining the twin goal of internal equity and market competitiveness over time.



**Non-Faulty Compensation Review
Austin Community College, Texas**

Evergreen Solutions was engaged with Austin Community College (ACC) to conduct a Compensation Review for its 1,348 non-faculty employees. Of these employees, 872 were non-exempt (Classified employees) and 476 were exempt (Professional/Technical employees). The primary objectives of the study were to: review the current compensation philosophy and components of the college's compensation program and make suggestions for improvement; conduct job analysis; revise and update job descriptions to reflect current duties; ensure that job descriptions reporting the performance of similar work with essentially the same level of complexity, responsibility, and knowledge, skills and abilities are classified appropriately; review the current existing pay structure and make recommendations that address living wage, structure midpoints, and structure maximums; ensure that individual levels of compensation are commensurate with assigned duties, minimum levels of experience, minimum education, and are also in line with relevant labor markets; and review current processes and make suggestions for improvement.

The objectives for the market study process review were to: review current process and practices and make suggestions for improvement; recommend appropriate sources for the market study; review benchmark positions and linked positions, and make recommendations; suggest appropriate trigger points to determine what positions may need to change pay grades and how these should be adjusted as changes in market or budget occur; and review and recommend a market analysis method that takes into consideration average pay of ACC incumbents along with the incumbents' experience.



**Job Classification and Compensation Study
El Paso Community College District, Texas**

Evergreen Solutions was engaged with El Paso Community College District (District) to conduct a comprehensive job classification and compensation study for 1,525 on-faculty and 1,427 faculty staff. The purpose of the study was to ensure that the District's position descriptions, job classifications, and salary tables were accurate, consistent, and hierarchically logical across the District, and capable of attracting, retaining, and motivating skilled and competent employees.

Evergreen consultants reviewed job descriptions for internal equity, conducted a market salary survey, and developed market pricing for each position. Evergreen provided specific recommendations for changes to the existing salary tables and the District's compensation structure in order to ensure that the District achieved and maintained competitive compensation levels within the market in which it operated and that



those levels were commensurate with actual position responsibilities and requirements across all positions. Evergreen consultants provided specific recommendations regarding necessary changes required to update District Board policies, procedures, and written guidelines to ensure that the integrity of the classification and compensation system continues long after the study is complete.



**Compensation and Classification Study
Midwestern State University, Texas**

Evergreen Solutions was on contract with Midwestern State University (MSU) to perform a comprehensive Compensation and Classification Study and to make recommendations for improvements and modifications to the current system. The study ensured that each employee was allocated to the proper classification and that the salary was commensurate with appropriate labor markets and peer institutions within the competitive area for the employee's duties and responsibilities.

Evergreen evaluated job classifications by conducting a task analysis for each position and evaluated job duties for title accuracy. Evergreen recommended updates to job descriptions, added position titles, and reviewed and made recommendations regarding FLSA Exempt/Non-exempt status for each position. Evergreen conducted a market survey, analyzed and made recommendations to current salary schedules based on comparable positions and examined the internal and external equity of pay among current employee based on qualifications, experience, and tenure. Evergreen then recommended implementation strategies including the cost of implementing the study with a phased approach and conducted a compression analysis to include any recommendations for implementation.



**Compensation and Classification Study
Lone Star College System, Texas**

Evergreen was retained by the Lone Star College System to conduct a Classification and Compensation Study. The study included orientation sessions, focus groups, and interviews at the various campuses. All 500 employees were asked to complete the Job Assessment Tool (JAT) and a job analysis was conducted with the results creating a classification plan. A salary survey was administered to local and regional employers to assess competitiveness. Findings and recommendations from the study were used to modify the College System's pay plan and policies and procedures.



**Compensation Study
Sul Ross State University, Texas**

Evergreen Solutions was hired by Sul Ross State University to conduct a Compensation Study for all 311 non-faculty employees and job classifications at all four campuses – Alpine, Del Rio, Uvalde, and Eagle Pass. The Evergreen Team conducted a comprehensive salary survey of the regional and statewide labor market peers, including specialized salary surveys by campus region, and provided detailed recommendations for adjusting the University's pay and classification structure. Evergreen also developed implementation and cost plans.



**Classification Study and Compensation Survey
City of Page, Arizona**

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



**Compensation Study
Town of Sahuarita, Arizona**

Evergreen Solutions was hired by the Town of Sahuarita to conduct a Compensation Study that is in alignment with the Town's Strategic Management Plan. Evergreen assisted the Town in developing a highly competitive pay philosophy to recruit and retain quality professional staff and surveyed the market to identify proper pay ranges in the public and private sector for similar classifications.



**Compensation Study
City of Carlsbad, New Mexico**

Evergreen Solutions was retained by the City of Carlsbad to conduct a Compensation Study. The study included evaluating 50 administrative positions and three elected official positions as benchmarks against the private and public labor market in the State of New Mexico, and making recommendations to improve competitiveness in alignment with the City's strategic goals. Evergreen's recommendations improved the competitiveness of the City and helped prepare the City for future recruitment challenges. **Note:** Evergreen was again hired in 2018 to conduct a compensation plan update.



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

Evergreen Solutions was retained by the City of Broken Arrow to conduct a Classification and Compensation Study and Analysis to evaluate the present salary structure as compared to the specific job market for comparable positions in the public sectors. Evergreen performed the following: reviewed all current job classifications, confirmed and recommended changes to hierarchical order of jobs using your evaluation system; established 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); identified potential pay compression issues and provided potential solutions; analyzed and recommended changes to the present compensation matrix and/or structure to meet the market analysis; and assessed potential impact of pending DOL changes.



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

Evergreen Solutions was retained by Sedgwick County to conduct classification and compensation study for approximately 2,766 employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity within the County and a plan was provided to address maintenance of implemented changes to the County's classification and compensation system. In addition, Evergreen provided County staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system would be accomplished.



**Comprehensive Compensation and Classification Study
Jefferson County, Missouri**

Jefferson County retained Evergreen Solutions to conduct a Comprehensive Compensation and Classification Study to analyze the County's market competitiveness and internal equity. Located just 40 miles southwest of the City of St. Louis, Jefferson County possessed a unique set of challenges being on the border of more rural, suburban, and even metropolitan markets. Maintaining market competitive compensation and classification plans in these environments required special effort. With this in mind, this study included a comprehensive classification analysis using the Job Assessment Tool job valuation



methodology in addition to a statistical assessment of current conditions. An assessment of external equity including a salary survey of competing organizations was conducted. The project concluded with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign the existing system in place for the County. **Note:** Evergreen previously conducted a Classification and Compensation Study.



**Comprehensive Classification and Compensation Study
City of Branson, Missouri**

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



**Compensation Study (included benefits survey)
County of Montgomery, Pennsylvania**

Evergreen Solutions was retained by the County of Montgomery to conduct a Compensation Study. The study included an examination of the County's compensation plan in order to provide recommendations for compensation policies, procedures and practices that provided internal equity and allowed the County to be competitive in the marketplace for attracting and retaining qualified employees

Evergreen recommended and identified a market position for Montgomery County by administering a comprehensive labor market salary survey to select public and private sector peers. Evergreen also conducted a comparative analysis of benefits provided in the market that included PTO, health, dental, vision and prescription, including percentage of contribution between employee and employer, long term disability (LTD), life insurance and pension benefits.

Evergreen then recommended appropriate salary ranges (i.e., min, mid, and max) for all non-represented classifications. Evergreen prepared a cost analysis for the recommended salary ranges.



**Salary and Benefits Study
City of Bloomington, Indiana**

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



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

Evergreen Solutions was retained by Blount County to conduct an Employee Classification and Compensation Study for its workforce. Evergreen conducted focus groups and interviews with employees and employees completed a Job Assessment Tool (JAT) that identified work performed. Evergreen presented to the Human Resources Director and Mayor any resultant classifications recommended in the classification study and provided for the maintenance of the new structure, including periodic review, reclassification review procedure and promotion guidelines.

For the compensation study, Evergreen identified survey labor market and benchmark classes to use for a market analysis; conducted a comprehensive compensation search utilizing other similar public sector employers; completed internal salary relationship analysis, including the development of appropriate internal relationship guidelines; developed externally competitive and internally equitable salary recommendations for each class included within the study in order to maintain appropriate competitive position in relation to other employers within the region; and assigned a salary range to each classification which reflected the results of the market survey and the analysis of internal relationships. Evergreen presented survey results to management to make a decision on overall pay philosophy. In the end, Evergreen recommended appropriate premium pay options to supplement the compensation plan. Examples included options for pay for certifications, professional licenses, special skills, temporary "acting" assignment at higher level duties, "on-call" and "callout" pay, pay alternatives for exempt level workers not normally eligible for overtime, and similar pay practices.



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

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



**Salary Plan Review
City of Suffolk, Virginia**

Evergreen Solutions was retained by the City of Suffolk to review the Compensation and Classification Study Final Report completed in 2009 by another firm. The goal of this review was to assess the applicability of recommendations since the study's completion, with an emphasis on reviewing:

- Phase 3 recommendations and applicability given time since completion of study;
- salaries of employees included in the 2009 study and those not included in the 2009 study (~300 employees hired after study completion) to assess internal equity;
- title changes recommended; and
- the City's Compensation Philosophy.

In the end, Evergreen provided a final report that included: a comparison of current market compensation data (obtained primarily from TechNet database) to City compensation data; recommendation for placement of all employee salaries for both employees included and not included in the 2009 study; a recommended pay plan/salary schedule; and a recommendation to address compression caused by Phase in approach across all employee groups, including police and fire.



**Classification and Compensation Study
City of Fredericksburg, Virginia**

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



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



**Classification and Compensation Study
City of Williamsburg, Virginia**

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



**Classification and Compensation Study
County of Culpeper, Virginia**

Culpeper County retained Evergreen Solutions to assist with a comprehensive classification and compensation study of all its employees. The study involved conducting a job analysis through desk audits, interviews, and focus groups. A more detailed analysis was performed on clerical and law enforcement staff. A salary and benefits survey was also issued to peers to assess the County's current market position. Recommendations were made for all employees to address job and compensation changes.



**Classification and Compensation Study
Gloucester County, Virginia**

Evergreen Solutions was retained by Gloucester County to conduct a detailed compensation and classification analysis of its non-faculty employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



**Compensation Study (Salary and Benefits)
Louisa County, Virginia**

Evergreen Solutions was retained by the Louisa County to conduct a Compensation Study. Evergreen's consultants reviewed the effectiveness of the County's current pay plan as it related to the market competitiveness for attracting and retaining quality employees. Pay ranges as well as benefits were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current compensation system.



**Salary Equity Study
Guilford County, North Carolina**

Evergreen Solutions was retained by Guilford County to assess pay equity based on race and gender for all 2,000 County employees. Evergreen's consultants performed an internal salary equity by reviewing the incumbent's related education and experience prior to County employment and related experience gained with the County. Evergreen's consultants also reviewed job descriptions, in conjunction with County Staff, to ensure that content and titles were current, accurate and were consistent with FLSA, EEO and ADA considerations. At the conclusion of the study, Evergreen made recommendations by individual position/employee for internal salary equity pay adjustments and provided an analysis that included a statistical treatment of pay placement and progression.



**Classification and Compensation Study
New Hanover County, North Carolina**

Evergreen was retained by New Hanover County and the New Hanover Alcohol Beverage Control Board to conduct a Classification and Compensation Study for its 1,654 employees. Evergreen's consultants conducted an employee classification and compensation study of public and private employers who were providing equitable services and, based on that study, determined whether individualized position/job descriptions were needed, and if so, assisted in the development of those descriptions. Evergreen prepared a comprehensive analysis that identified New Hanover County's competitive position in the labor market and provided a recommendation for total salaries and benefits, including the total compensation package of insurance and other benefits (including paid leave) and, prepared recommendations for compensation policies, including variable incentive pay options, to maintain competitiveness, reward employees, and ensure equity. Select County and ABC Board were provided the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total classification and compensation system could be accomplished.



**Comprehensive Position Classification and Compensation Study
Gaston County, North Carolina**

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

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



**Classification and Compensation Study
City of Lancaster, South Carolina**

Evergreen Solutions was retained by City of Lancaster to conduct a detailed compensation and classification analysis of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



**Compensation and Classification Study
City of Chester, South Carolina**

Evergreen Solutions was hired by the City of Chester to conduct a comprehensive compensation and classification study for all City employees. The Evergreen Team conducted orientations and focus groups with general employees. Employees completed Job Assessment Tools, and supervisors completed Management Issues Tools, as needed. The data gathered through this process resulted in JAT scores for each job title, placement of each job into an internal hierarchy, and recommendations for revision to the current classification structure.

Evergreen worked with City Human Resources staff to conduct a comprehensive salary survey. The results were combined with the internal hierarchy to help generate recommendations for a comprehensive compensation and classification structure. The Evergreen Team provided detailed recommendations for implementation of the new structure and related employee salary adjustments.



**Classification and Compensation Study
City of Goose Creek, South Carolina**

Evergreen Solutions was retained by the City of Goose Creek to conduct a Classification and Compensation Study. Evergreen reviewed the current classification system by including a job analysis, assessed job descriptions and made recommendations for changes; provided the tools necessary to maintain the classification system for future positions if a new classification system was recommended; and revised the current Compensation Plan based on the labor market. In the end, Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



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

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

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

Evergreen also developed and recommended a new and revised performance appraisal instrument(s) that would support the City's mission and strategic objectives and the City's compensation philosophy, and would work in concert with the classification and pay system that was established. Evergreen consultants worked with the Human Resources Department and other City officials to link the proposed performance evaluation system to the pay structure, and identified any real or



perceived internal equity and salary compression issues within the City's various departments/offices, and listed options to address such questions as to how these issues were addressed by other municipalities.

In the end, Evergreen provided recommendations to the classification and compensation structure along with associated costs or savings of implementing those recommendations. Evergreen also provided training/education presentations to managers and senior management staff to ensure that there was an understanding and commitment to the new classification and compensation system.



**Salary Parity Study / Structural and Compensation Systems Study
Charleston County, South Carolina**

In 2005-06, Charleston County conducted a Classification and Compensation Review using another consulting firm. Then in 2007, Evergreen Solutions was hired by the County to review the results and verify the recommendations that accompanied the study. The primary issue examined by Evergreen was the internal equity relationships present within the County's pay plan. The Evergreen Team administered a job analysis tool to all 1,500 County employees that helped determine job worth and verify internal equity relationships as they relate to compensation. Although the study's primary emphasis was ensuring that internal equity relationships were proper, the study also ensured that employees were paid consistently with the market. Evergreen provided detailed recommendations for adjusting the County's pay and classification structure and developed an implementation plan complete with costing information.

Note: Evergreen was again hired in the latter part of 2012 to conduct a Structural and Compensation Systems Study. The Evergreen Team worked with elected official and employee committee throughout the process. Our phases included employee outreach, best practice research, and consensus building to recommend a 21st century approach to compensation and classification management. Evergreen is currently working with the County to conduct an update to its Compensation and Classification Plan.



**Classification and Compensation Study
Berkeley County, South Carolina**

Evergreen Solutions was retained by Berkeley County to conduct a Classification and Compensation Study. Evergreen's consultants reviewed the County's current classification and compensation plan and recommended a consistent and competitive market position that the County could maintain based on a salary survey results from peer organizations. Evergreen recommended an appropriate salary range for each position in the County based on a review and analysis of the classification plan, the compensation survey results, internal relationships, and external and internal equity. Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.



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

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

Evergreen provided written guidelines for maintaining class specifications/job descriptions, for evaluating/re-evaluating job class specifications/job descriptions and for maintaining model compensation structure (s). Evergreen further recommended pay administration policies to include, but not be limited to, policies regarding movement through ranges, adjustments within pay grades, adjustments for assumption of additional duties (temporary or permanent), reclassifications, promotions, transfers, demotions, career ladders, etc. and recommended reliable external market data sources for salary structure adjustments and determination of merit budget. Upon recommendation to the Town for the implementation of a new classification and compensation program, Evergreen's consultants reviewed current performance management system documentation and provided recommendations to strengthen link between pay and performance as appropriate. In addition, Evergreen recommended future merit allocation approaches, considering changes to classification and compensation program and limited budgets.



**Compensation and Benefits Study
Forsyth County, Georgia**

Evergreen Solutions was hired by Forsyth County to conduct a Compensation and Benefits Survey for the various departments/offices of the County (i.e., 1,125 employees). The objective of the survey was to provide Forsyth County Government a competitive position with other comparable government entities and private employers within the same geographic area to attract and retain qualified employees. Evergreen's consultants reviewed the current compensation plan and salary grade levels to understand the current challenges facing the County in recruiting and retaining employees. Evergreen surveyed comparable labor markets competing with the County for labor in the greater metro Atlanta labor market and comparable public organizations. The survey was designed to capture not only base salary information but comprehensive benefits information (inclusive of: deferred compensation; leave plans; employer paid medical, dental, vision, disability insurance, life insurance) to ensure that the County was competitive with other public organizations in the greater metro Atlanta labor market in its total compensation package.



In the end, Evergreen prepared a final report of findings with written recommendations regarding specific classifications, salary market adjustments, and preferred benefit package and recommended necessary salary range changes for the County's job classifications.



**Employee Classification and Compensation Study
City of Savannah, Georgia**

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

Evergreen further assisted the City in formulating a formal compensation philosophy and developed a compensation system for all job classifications based upon the adopted compensation philosophy. Evergreen identified comparable benchmark employers to guide the City's future employee salary and benefit decisions in order to facilitate the retention and attraction of high performing staff members, while being financially sustainable. Evergreen's consultants trained Human Resource staff so that they could apply the compensation philosophy to maintain and enhance the adopted compensation system.



**Compensation Analysis
City of Alpharetta, Georgia**

Evergreen Solutions was engaged with the City of Alpharetta to conduct a competitive compensation analysis. The purpose and intent of the study was to compare and contrast the City's current wage and benefit structure and levels with those of key competing employers— both public and private. The analysis was based upon job descriptions and/or duties performed rather than upon job titles in order to ensure accurate comparisons and to consider all aspects of the City's compensation package. At the time of this study, the City of Alpharetta employed 414 full-time and five part-time positions, excluding senior management and elected officials, defined across 132 position descriptions. The base salary ranges for these positions were divided among eight pay grades.



The primary goals of this project were to: determine the City's competitive position within the marketplace in terms of its overall compensation package; determine the relative value and competitive positioning of each compensation/benefit area; and identify any weaknesses within the components of the City's existing compensation package that may negatively impact the organization's ability to attract and retain talented employees.



Classification and Compensation Study and Analysis City of Douglasville, Georgia

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

Evergreen performed the following tasks:

- evaluated the City's present salary structure as compared to the relevant job market for comparable positions in both the private and public sectors;
- reviewed all current job descriptions and analyze same for knowledge, skills, abilities, education and experience relevance and internal consistency, job definitions and summaries, distinguishing characteristics, supervision received and exercised, conformity with the ADA relative to essential job functions (including physical demands); and special requirements including licensing and certifications;
- reviewed the City's current Position Classification and Wage Administration Plans and provided recommendations for enhancement and specific guidelines for requests pertaining to the following: creating new positions, salary adjustments and reclassifications, retroactive pay, compensation for additional duties (temporary and permanent assignments) and internal equity adjustments;
- analyzed all existing job family classifications, pay grades and salary ranges and recommend modifications as necessary;
- analyzed all existing FLSA classifications and recommended modifications as necessary; and
- identified potential pay compression issues and provided alternative solutions.



Classification and Compensation Study City of Winter Park, Florida

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



Compensation Study City of Hollywood, Florida

The City Hollywood retained Evergreen to conduct a compensation study of all 1,369 non-represented and represented employees. A job-task analysis/job audit was conducted to determine whether classifications were correctly placed in the organizational hierarchy and whether individual job positions were classified correctly. Evergreen reviewed job descriptions using the Job Assessment Tool job valuation methodology and conducted a statistical assessment of current conditions to ensure compliance with federal and state laws including proper designation of classifications as "exempt" vs. "non-exempt". Evergreen conducted a comprehensive survey to ensure that the City of Hollywood's compensation plan was equitable and competitive in its total compensation package relative to internal factors and external markets (The City's goal was to be in the top 25% in salary). Evergreen's consultants reviewed existing salaries to determine proper placement within proposed classifications, and recommend appropriate "equity adjustments" as needed, based upon the results of the salary survey and the recommended pay plan.

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



Compensation and Classification Study Alachua County, Florida

Evergreen Solutions was engaged with Alachua County to conduct a Compensation and Classification Study of jobs under the Board of County Commissioners, the Sheriff, Tax Collector, Property Appraiser, Supervisor of Elections, and the Library District. Specifically, the County desired the following services to be performed by Evergreen:

- develop and administer a job analysis questionnaire for the purpose of having employees state their job duties and qualifications including education, experience, licenses and certificates; working conditions (physical and environmental) and all other pertinent information;
- prepare and present to the Board of County Commissioners a report documenting the results of the job analysis by classification and recommendations concerning a classification structure and pay adjustments;
- allocate each employee with regard to the new classification structure;
- identify benchmark classifications to be used to determine appropriate markets for salary survey purposes, as well as to determine the position of the county with regard to salaries for comparable jobs in appropriate markets;
- administer a salary survey for the purpose of recommending appropriate salaries based on external (market) and internal (equity) considerations;
- recommend a salary structure, including the number of pay grades, and pay ranges;
- recommend salaries for each classification, as well as recommended salaries for each employee;
- provide a classification maintenance plan;
- provide guidelines and procedures for administering the resulting classification plan to include the following: Initial placement in the salary range and means for movement through the range; and
- train HR and departmental staff on the methodology and maintenance of the recommended classification and pay plan.



Compensation, Classification, and Performance Management Study Manatee County, Florida

Evergreen Solutions was hired by Manatee County to assist with a county-wide Compensation and Classification Study. At the time of the study, Manatee County was a growing county with a population of over 300,000 located on the southwestern coast of FL between Pinellas and Sarasota Counties. An appointed County Administrator oversaw 16 departments, with approximately 2,900 employees within approximately 600 classifications and 58 pay ranges/grades.

The study included all employees that serve in capacities for the Board of County Commissioners. As part of the review, orientation sessions, focus groups, and interviews were conducted in throughout the county. All employees were asked to complete the Job Assessment Tool (JAT) and job analysis was conducted with the results in order to create a classification plan. A salary survey was issued to local and regional employers to assess competitiveness. Based on the classification and compensation findings, a new pay plan as well as policies and procedures were recommended to the County. Evergreen Solutions helped the County attain their goal of maintaining a sound process providing a classification and pay structure that is fair, equitable, and systematic with a compensation plan comparable with other governmental jurisdictions and the private sector. In addition, Evergreen reviewed the performance management system in place within the County, and provided recommendations for improvement. **Note:** Evergreen completed a market survey and compensation analysis update in the latter part of 2012 and again in 2015.



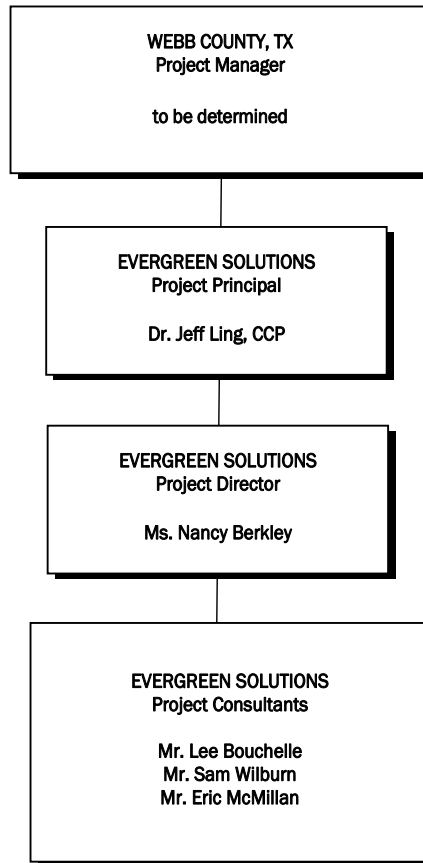
1.3 Proposed Project Team

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

Exhibit 1-3 shows our proposed project management organization and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Employee Classification and Wage Study so that there will be no confusion as to who is responsible for any aspect of this engagement.



**Exhibit 1-3
Proposed Project
Management
Organization and
Personnel
Assignments**



Webb County (County) Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The County's Project Manager will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the County's Project Manager and all project deliverables will be filtered through the County's Project Manager throughout the duration of the project.

Evergreen Solutions Project Director. Evergreen designates a Project Director for each HR consulting project. The Project Director will have ultimate accountability for the success of this project and will have the most frequent contact with the County. The Project Director will assign project activities to the Project Consultants, and will ensure that deliverables are met within specified timelines.

Evergreen Solutions Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will conduct orientation sessions and focus groups, administer the JATs and MITs, collect the data for the salary survey, review and revise job descriptions, and prepare draft materials for the Project Principal and Project Director to review.



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

Key Personnel

The following paragraphs provide summaries of each team member's qualifications and experience related to his/her role in this engagement.

Project Director Dr. Jeff Ling, CCP

Dr. Ling is Executive Vice-President of Evergreen Solutions and has been with the firm since its inception. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

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

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

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

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

- Classification/Compensation– He developed the methodology and techniques for organizations to employee for successful data collection and implementation based on internal and external equity needs. He has been the Project



Principal for numerous projects related to classification and/or compensation. Some of the local government clients that he has worked with, or is currently on contract to work with, include: City of Rowlett, TX; City of Seguin, TX; City of Austin, TX; City of Pearland, TX; City of Temple, TX; City of Fredericksburg, TX; City of Mont Belvieu, TX; City of Conroe, TX; City of Sunset Valley, TX; City of Fate, TX; City of Gonzales, TX; City of Buda, TX; City of Pflugerville, TX; City of Amarillo, TX; City of Athens, TX; City of Farmers Branch, TX; Denton County, TX; Travis County, TX; Ft. Bend County, TX; Town of Little Elm, TX; City of Carlsbad, NM; City of Santa Fe, NM; City of Branson, MO; City of Lee's Summit, MO; St. Charles County, MO; Jefferson County, MO; Clay County, MO; Sedgwick County, KS; City of Pittsburg, PA; County of Montgomery, PA; County of Allegheny, PA; City of Page, AZ; Town of Sahuarita, AZ; City of Manitou Springs, CO; San Miguel County, CO; Blount County, TN; Mahoning County, OH; City of Suffolk, VA; City of Fredericksburg, VA; City of Williamsburg, VA; Gloucester County, VA; County of Culpeper, VA; Essex County, VA; King George County, VA; Prince George County, VA; Louisa County, VA; Isle of Wight County, VA; Montgomery County, VA; Loudoun County, VA; City of Chester, SC; City of Conway, SC; City of Lancaster, SC; City of Mauldin, SC; Charleston County, SC; Berkeley County, SC; Town of Mount Pleasant, SC; Town of Hilton Head Island, SC; Tri-County Council for Southern Maryland; Washington County, MD; Allegany County, MD; City of Westminster, MD; City of Hyattsville, MD; City of Annapolis, MD; Union County NC; Guilford County, NC; Gaston County, NC; New Hanover County, NC; City of Kingsland, GA; City of Garden City, GA; City of Alpharetta, GA; City of Douglasville, GA; City of Savannah, GA; Lumpkin County, GA; Forsyth County, GA; Douglas County, GA; Cherokee County, GA; City of Foley, AL; Town of Colchester, VT; Charlotte County, FL; Osceola County, FL; Manatee County, FL; Palm Beach County, FL; Pinellas County, FL; Seminole County, FL; Monroe County, FL; City of Coral Springs, FL; City of Sunrise, FL; City of Ocala, FL; City of Kissimmee, FL; City of Palm Beach Gardens, FL; City of Winter Park, FL; City of Lake City, FL; City of Albany, OR; and many others. **Note:** Dr. Ling also served as the Project principal for many other similar studies for public sector clients in the State of Texas, including: Texas City Management Association; Bexar Metropolitan Water District; Barton Springs Edwards Aquifer Conservation District; Dallas Area Rapid Transit; Denton County Fresh Water Supply District; Brazos River Authority; South Texas College; Tarrant County College District; Sul Ross State University; Lone Star College System; El Paso Community College District; Midwestern State University; Sam Houston State University; and Austin Community College.

- Performance Evaluation – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been



instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.

- Market Research – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- Policy Development – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

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

Project Director
Ms. Nancy Berkley

Ms. Berkley is a Manager at Evergreen Solutions who has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Ms. Berkley possesses expertise in the following HR areas:

- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.
- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and



tools—including total revision and communication of a company’s HR policies and practices to be in accordance with state and federal laws;

- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Recent public sector projects that Ms. Berkley has directed or served on the Evergreen Team include: a Classification and Compensation Study for the City of Conroe, TX; a Human Resources Department Assessment for the City of Buda, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Comprehensive Compensation and Benefits Study for the City of Rowlett, TX; a Classification and Compensation Study for the Town of Little Elm, TX; a Classification and Compensation Study for the Lone Star College System, TX; a Job Classification and Compensation Study for El Paso Community College District, TX; a Compensation Study for South Texas College; a Non-Faculty Compensation Review for Austin Community College, TX; a Classification Study and a Compensation Survey for the City of Page, AZ; a Salary Survey for the City of Dania Beach, FL; a Classification, Compensation, and Benefits Study for the Town of Jupiter, FL; a Classification and Compensation Study for the Town of Cutler Bay, FL; a Comprehensive Compensation and Classification Study for the City of Panama City, FL; a Comprehensive Compensation and Classification Study for the City of Panama City Beach, FL; a Compensation and Classification Study for Alachua County, FL; Job Audits for the City of Gainesville, FL; a Pay and Classification Study for the City of Fort Walton Beach, FL; a Compensation Study for Lake County, FL; a Classification and Compensation Study for the City of Destin, FL; a Compensation and Classification Study for Highlands County, FL; a Compensation Study for the Village of North Palm Beach, FL; a Compensation Study for the City of Hollywood, FL; Compensation and Classification Study Services for Monroe County, FL; a Compensation and Benefits Study and Analysis for the City of Dahlonoga, GA; a Compensation Analysis for the City of Alpharetta, GA; Employee Classification and Compensation Study for the City of Savannah, GA; Comprehensive Classification and Compensation



Study for the City of Garden City, GA; a Compensation and Classification Study for the City of Brookhaven, GA; a Comprehensive Compensation and Classification Study for the City of Tybee Island, GA; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Compensation Study for the City of Statesboro; a Salary and Benefits Survey for the City of Roswell, GA; a Compensation and Benefits Survey for Forsyth County, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Classification and Compensation Study for Lumpkin County, GA; a Classification and Compensation Study for the Town of Hilton Head Island, SC; a Classification and Compensation Study for Berkeley County, SC; a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, SC; a Pay and Classification Study for the Town of Moncks Corner, SC; Classification and Compensation Plan Review for the City of Annapolis, MD; a Classification and Compensation Study for Gloucester County, VA; a Pay and Classification Study for the Isle of Wight County, VA; a Classification and Compensation Study for Essex County, VA; a Compensation and Classification Study for Montgomery County, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Salary Equity Study for Guilford County, NC; a Position Classification and Compensation Study for Gaston County, NC; a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, NC; a Classification and Compensation Study for Sedgwick County, KS; a Classification and Compensation Study for Jefferson County, MO; and a Classification and Compensation Study for Blount County, TN.

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University and has been certified as a SPHR since 1997.

**Project Consultant
Mr. Lee Bouchelle**

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

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



Recent public sector projects for Evergreen in which Mr. Bouchelle has been involved include: a Human Resources Department Assessment for the City of Buda, TX; a Classification and Compensation Study for the City of Athens, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Classification Study and a Compensation Survey for the City of Page, AZ; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Classification and Compensation Study for the City of Fredericksburg, VA; a Pay and Classification for the City of Williamsburg, VA; a Pay and Classification Study for the District 19 Community Services Board, VA; Classification and Compensation Plan Review for the City of Annapolis, MD; a Wages and Salary Scale Study for Washington County, MD; a Position Classification and Compensation Study for Gaston County, NC; a Classification and Compensation Study for Berkeley County, SC; a Classification and Compensation Study for Dorchester County, SC; a Pay and Classification Study for the Town of Moncks Corner, SC; Salary Comparability Study for the Housing Authority of Florence, SC; a Compensation Update for the Central Ohio Transit Authority; an Employee Classification and Compensation Study for Blount County, TN; a Salary Comparability Study for the Springfield Housing Authority, IL; a Classification and Compensation Study for Jefferson County, MO; a Compensation and Classification Study for Clay County, MO; a Compensation and Classification Study for Alachua County, FL; a Pay and Classification Study for Monroe County, FL; a Job Classification and Pay Study for Flagler County, FL; a Job Classification and Compensation Study for the City of Sunrise, FL; a Classification and Compensation Study for the City of Delray Beach, FL; a Compensation and Classification Study for the City of North Port, FL; a Classification and Compensation Study for the City of High Springs, FL; a Pay and Classification Study for the City of Holly Hill, FL; Compensation Consulting Services for the Town of Longboat Key, FL; a Job Classification and Compensation Study for the City of Melbourne, FL; a Classification and Compensation Study for the City of Dania Beach, FL; a Pay and Classification Study for the Lake County Sheriff's Office, FL; a Compensation Study for the Bay County Sheriff's Office, FL; a Compensation Study for the Walton County Sheriff's Office, FL; FLSA Audits for the Southwest Florida Water Management District; a Classification and Compensation Study for the City of Destin, FL; a Compensation Plan Update for the City of Garden City, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Classification and Compensation Study for Lumpkin County, GA; an Employee Classification and Compensation Study for the City of Savannah, GA; and a Pay and Classification Study for the City of Chamblee, GA.

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



**Project Consultant
Mr. Sam Wilburn**

Mr. Wilburn is a Consultant with Evergreen. He is a former engineer who possesses a strong background in qualitative and quantitative analysis at the professional level. He is able to apply his knowledge and skills as a Consultant for Evergreen through various functions including: conducting market research and collecting compensation data, utilizing job assessment tools to analyze different job classifications, running regression analyses and recommending appropriate pay grades, editing job descriptions, and preparing performance evaluation files. He is also responsible for developing and maintaining project solution files which comprise of multiple alternatives geared toward bringing salaries to more market-competitive levels and their total cost estimates for implementation. In addition, he assists in preparing presentations and research reports for clients.

Recent Projects that Mr. Wilburn has been involved with include: a Classification and Compensation Study for the City of Conroe, TX; an Employee Evaluation System for the North Charleston Sewer District, SC; a Pay and Classification Study for Buncombe County, NC; Classification and Compensation Study Services for the City of Westminster, MD; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Wages and Salaries Compensation Study for the City of Stockbridge, GA; a Compensation and Benefits Study for Cherokee County, GA; a Pay and Classification Study for the Florida Keys Aqueduct Authority; a Classification and Compensation Study and Analysis for the City of Villa Rica, GA; a Salary Survey for the City of Dunwoody, GA; and a Salary Survey for the School Board of Sarasota County, FL.

Mr. Wilburn has an MBA with emphasis in Human Resources and a Bachelor's of Science dual degree in Civil and Environmental Engineering from Florida State University. He also holds a Building Contractor's license in the State of Florida.

**Project Consultant
Mr. Eric McMillan**

Mr. McMillan is a Senior Analyst at Evergreen Solutions. His background has been in the study of financial reporting, data analysis, and market research using techniques in accounting, analytics, and research. This allows him to communicate and engage with clients through data and design.

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

- working closely with project teams and project managers in coordinating salary and benefit survey initiatives;
- evaluating market data from surveys, government agencies, and private sector databases to provide comprehensive reviews of compensation packages; and



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- designing clear and concise reports and displays to communicate nuanced results.

Recent public sector projects that Mr. McMillan has been involved with include: a Classification and Compensation Study for the City of Conroe, TX; a Human Resources Department Assessment for the City of Buda, TX; a Comprehensive Compensation and Classification Study for the City of Farmers Branch, TX; a Classification Study and a Compensation Survey for the City of Page, AZ; a Classification and Compensation Study for Jefferson County, MO; a Classification and Compensation Study for Blount County, TN; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Pay and Classification Study for the City of Williamsburg, VA; a Classification and Compensation Study for the City of Fredericksburg, VA; a Compensation Study for King George County, VA; a Classification and Compensation Plan Review for the City of Annapolis, MD; Wages and Salary Scale Study for Washington County, MD; a Position Classification and Compensation Study for Gaston County, NC; a Compensation and Classification Study for Union County, NC; a Pay and Classification Study for the Town of Moncks Corner, SC; a Classification and Compensation Study for the City of Goose Creek, SC; a Classification and Compensation Study for Berkeley County, SC; a Pay and Classification Study for the City of Chamblee, GA; a Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Wages and Salaries Compensation Study for the City of Stockbridge, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Salary Survey for the City of Dunwoody, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Classification and Compensation Study for Lumpkin County, GA; a Classification and Compensation Study and Analysis for Douglas County, GA; a Compensation and Benefits Study for Cherokee County, GA; a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, GA; a Compensation and Job Grading Analysis for the Jacksonville Aviation Authority, FL; a Classification and Compensation Study for the City of Delray Beach, FL; a Classification and Compensation Study for Pasco County Sheriff's Office, FL; Compensation Consulting Services for the Town of Longboat Key, FL; a Compensation Plan Update for the City of Panama City Beach, FL; a Compensation Plan Update and Performance Evaluation Study for Lake County, FL; a Compensation and Classification Study for the City of North Port, FL; and FLSA Audits for the Southwest Florida Water Management District.

Mr. McMillan holds a Bachelor Degree in Accounting and Marketing from Florida State University and is working toward a Master's Degree in Human Resources.



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



Section 2.0
Technical Proposal



2.0 *Technical Proposal*

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

2.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct an Employee Classification and Wage Study for Webb County as our team includes recognized experts in local government human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

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

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.

Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management



requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that 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 Solutions realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.

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

Kick Off Meeting

Evergreen Solutions begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:

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

At this time, we will also request a copy of the employee database that reflects current classification and compensation data.

Communication Plan

Communication is a critical component of any employee classification and wage study. Communicating with employees directly and early in the process builds support for the process and the accompanying outcomes. As part of our communication plan, we meet first with key project staff to fully understand the nature and scope of the project. The results of these meetings are then communicated to employees during the project outreach through employee orientation sessions, focus groups, and interviews. Regular updates are provided to the client's Project Manager and can be posted on the client's intranet site, if available and desired. Additionally, the communication plan for the distribution of the end product, particularly how the results will be distributed to employees, is also critical.

Employee Orientation and Focus Groups

Based on client feedback and a review of best practices, we have designed an orientation curriculum that provides employees insight into the process as well as provides a forum for answering questions and soliciting participation. Following the orientation sessions, we begin the focus group process. Focus groups are used to gain detailed insight into employee perceptions, concerns, and issues. The protocol for the sessions is provided to your project team in advance and refined to meet your needs.



Department Head Interviews

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question and answer formats allow employees to become engaged in the process. During these sessions, Evergreen Solutions consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

Evergreen Solutions staff conduct one-on-one interviews with department heads and/or senior management (in addition to any other employees the client determines is necessary) to identify challenges for consideration. These interviews will allow our staff to add details to our understanding of the organization and its needs. They also allow our consultants the opportunity to better understand the organizational structure of each department as well as the unique recruiting and retention issues that may be present in each department. Frequently, department directors and senior management serve as invaluable resources in explaining how internal equity relationships have evolved over time and explaining the nuances between the differences in jobs.

Job Assessment Tool and Management Issue Tool

Another important activity undertaken at this time is the distribution of Evergreen Solutions' Job Assessment Tool© (JAT). These questionnaires are central components of the job evaluation process. The JAT asks a series of questions regarding an employee's job that captures the nature of the job and how it interacts with work within the organization.

The JAT contains questions that ask about each of the following areas:

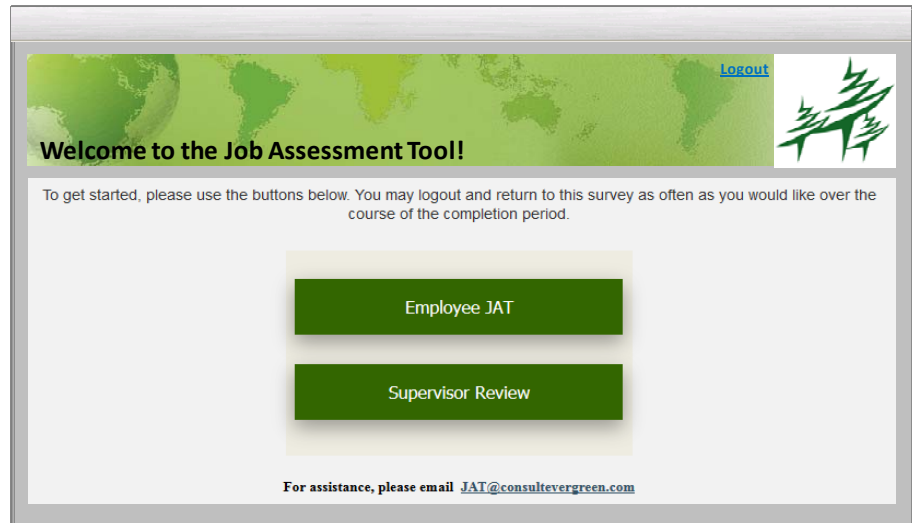
- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

Evergreen Solutions will contact the client's Project Manager should there be a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically. If requested, we can also provide a paper-based version of the tool.



Exhibit 2-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.

Exhibit 2-1
Supervisor's JAT Home Screen



Source: Evergreen Solutions, 2018

Exhibit 2-2 illustrates how Evergreen Solutions uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen Solutions designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



Exhibit 2-2 Job Description and Responsibilities

The screenshot shows a web form titled "Basic Job-Related Information" with a green header and a "Logout" link. The form is divided into four main sections:

- Job Introduction:** A text area for a brief overview of the job, with a character count of 2000.
- Type of Work:** A section where users select the best level that describes their work from five radio button options:
 - Clerical/Manual - Perform a variety of office and administrative support duties OR unskilled, labor-intensive tasks.
 - Laborer/Trade-Based Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy.
 - Technical/Paraprofessional - Performs tasks requiring a solid understanding of basic algebra and statistics OR use of heavy equipment.
 - Administrator - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance.
 - Managerial/Professional - Performs tasks requiring advanced knowledge, which is predominantly intellectual in nature, OR tasks related to the control or administration of part of the organization.
 - Executive/Advanced Professional - Performs tasks related to managing the organization, or managing a department OR perform work requiring highly advanced knowledge.
- Education and Experience:** Two dropdown menus for "Education" and "Experience", both currently set to "-Select One-".
- Licenses and Certifications:** A text area for listing any licenses, certifications, or professional designations, with a character count of 255.

A green "SAVE" button is located at the bottom of the form.

Source: Evergreen Solutions, 2018

Exhibit 2-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen Solutions to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.



**Exhibit 2-3
Job Functions**

Source: Evergreen Solutions, 2018

In addition to the JAT, Evergreen will also distribute our Management Issues Tool (MIT). The MIT is distributed to supervisors and managers and is used to collect specific information from supervisors and managers related to such issues as recruitment and retention problems, classification issues, pay equity issues, problems with titles, and other related issues. Each MIT will be logged and a specific response will be provided. The MIT process is designed to allow supervisors and managers to give direct input into the process and they serve as “red flags” to Evergreen Solutions staff during the analysis portion of project.

Job Evaluation

The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen’s consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious



	<p>discrepancies exist, Evergreen’s consultants will work directly with the Client Project Manager to resolve any issues.</p>
	<p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
Compensation	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p>
	<p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization’s compensation philosophy.</p>
Market Survey	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen’s consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p>
Benchmarks	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client’s needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.</p>



Targets

To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

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

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

Evergreen Solutions uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

Unifying the Solution

After determining the appropriate division of work and market position, the compensation structure can be created. There is not a single, perfect solution for every client partner. The nuances and unique characteristics of each client necessitate a customized solution to best meet the organization's needs.

The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.

It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is



**Compensation
Administration
Guidelines**

completed, Evergreen’s consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.

In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;
- how often to adjust pay scales and survey the market;
- timing of implementation; and
- how to keep the system fair and competitive over time.

**System
Maintenance**

Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client’s staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

Based on client needs and industry best practices, Evergreen Solutions has developed a compensation and classification maintenance tool to assist our clients with implementing, managing, and updating the solutions: **JobForce Manager**. This tool allows our clients to estimate future pay plan changes, update the market information, make determinations on reclassifications, and create new jobs. By automating these tasks, **JobForce Manager** allows our clients to not only streamline, but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

Exhibit 2-4 displays the interface from **JobForce Manager** for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be noted and provided to key decision makers.



Exhibit 2-4 – JobForce Manager Tool

Pay Plans	Scoring/Slotting	Compensation	Market		
Download Data Grid Edit					
CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)
Accounting Specialist II	ESP	212.5	\$30,100.27	\$31,220.80	\$31,508.69
Accounting Specialist III	ESP	281.3	\$39,058.27	\$34,379.43	\$40,213.96
Accounting Specialist IV	ESP	306.3	\$42,315.73	\$40,166.80	\$44,335.90
Accounting Supervisor	ESP	500.0	\$67,561.02	\$69,350.91	\$68,779.53
Acquisition Specialist	ESP	306.3	\$42,315.73	\$41,595.60	\$44,335.90
Administrative Aide	ESP	312.5	\$43,130.09	\$36,624.74	\$44,335.90
Administrative Recording Secretary	Professional	381.3	\$52,088.10	\$40,994.30	\$58,245.16
Administrative School Secretary I	ESP	206.3	\$29,285.91	\$31,619.17	\$33,084.13
Administrative School Secretary II	ESP	231.3	\$32,543.36	\$35,996.59	\$34,738.33
Administrative School Secretary III	ESP	256.3	\$35,800.82	\$37,701.80	\$38,299.01
Administrative Secretary I	ESP	231.3	\$32,543.36	\$32,190.02	\$33,084.13
Administrative Secretary I	ESP	206.3	\$29,285.91	\$32,190.02	\$33,084.13
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary II	ESP	231.3	\$32,543.36	\$33,919.04	\$34,738.33
Administrative Secretary III	ESP	256.3	\$35,800.82	\$35,971.01	\$38,299.01
Administrative Specialist	Professional	231.3	\$32,543.36	\$43,762.63	\$39,422.62
Administrative Specialist-School Food Services	Professional	275.0	\$38,243.91	\$42,861.08	\$45,636.61

Source: Evergreen Solutions, 2018

2.2 Detailed Work Plan

The detailed work plan that Evergreen Solutions proposes to use to conduct the Employee Classification and Wage Study for Webb County is provided in this section. Evergreen understands that the County has 824 full-time employees that will be included in this study.

Our work plan consists of the following 12 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
- Task 5: Identify List of Market Survey Benchmarks
- Task 6: Identify Approved List of Targets
- Task 7: Conduct Market Survey and Provide External Assessment Summary
- Task 8: Develop Strategic Positioning Recommendations
- Task 9: Conduct Solution Analysis
- Task 10: Develop and Submit Draft and Final Reports
- Task 11: Develop Recommendations for Compensation Administration
- Task 12: Provide Revised Class Descriptions and FLSA Determinations



Task 1.0
Project Initiation

TASK GOALS

- Finalize the project plan with Webb County (County).
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final time line for all project milestones and deliverables.

TASK ACTIVITIES

- 1.1 Discuss with the County's Project Manager (CPM) and the County Committee the following objectives:
- the classification and pay plan study process;
 - understand mission and current compensation philosophy (if any);
 - 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 County and some of the short- and long-term priorities. This activity serves as the basis for assessing where the County is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials from the County, including:
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
 - organizational charts for the departments and divisions, along with related responsibility descriptions;
 - current position and classification descriptions, salary schedule(s), and classification system;
 - strategic business plans and budgets; and
 - personnel policies and procedures handbook.
- 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.



**Task 2.0
Evaluate the
Current System**

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of County staff

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation plan(s) for the County.

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy. 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) for the County.
- 2.3 Review possible compression issues and discuss resolutions.
- 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)
- 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 County.
- Guide subsequent analytical tasks.

TASK ACTIVITIES

- 3.1 Schedule and conduct employee orientation sessions (i.e., briefing sessions).
- 3.2 Meet with department heads/supervisors to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.



**Task 4.0
Evaluate and Build
Projected
Classification Plan**

- 3.3 Hold focus groups with a sample of employees from the County to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the CPM to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.
- 3.5 Review any data provided by the County that may provide additional relevant insight.
- 3.6 Review internal career ladders and make recommendations to keep positions competitive.

KEY PROJECT MILESTONES

- JAT and MIT distribution
- Department head/supervisor interviews
- Employee focus groups and orientation sessions

TASK GOALS

- Identify the classification of existing positions utilizing Evergreen's job evaluation system.
- Review JAT responses.
- Characterize internal equity relationships within the County.

TASK ACTIVITIES

- 4.1 Review all draft class specifications of the CPM and Director of Human Resources.
- 4.2 Review the work performed by each classification and score. Include an evaluation of supervisory comments.
- 4.3 Review JAT scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.
- 4.5 Develop preliminary recommendations for the classification structure. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of



classifications would be established, and classifications with similar scoring would be grouped into pay grades and spacing between jobs would be determined.

4.6 Review and determine appropriateness of classification series and levels within the series (i.e., Levels I – II, Senior/Lead, etc.).

4.7 Review recommendations with the CPM.

KEY PROJECT MILESTONES

- JAT scores by class
- Recommended classification changes
- Preliminary job structure based on internal equity

TASK GOAL

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

TASK ACTIVITIES

5.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to select up to 50 benchmarks for the salary survey that are representative of the County's positions.

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

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

KEY PROJECT MILESTONES

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

TASK GOAL

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

TASK ACTIVITIES

6.1 Review with the CPM the peer organizations that should be included in the survey. Evergreen will work with the CPM to select up to 20 targets for the salary survey.

Task 5.0
Identify List of
Market Survey
Benchmarks

Task 6.0
Identify Approved
List of Survey
Targets



**Task 7.0
Conduct Market
Survey and
Provide External
Assessment
Summary**

- 6.2 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
- size of the organization;
 - geographic proximity to the Laredo area;
 - economic and budget characteristics; and
 - other demographic data.
- 6.3 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 6.4 Review survey methodology with CPM and refine survey methodology prior to distribution of survey.
- 6.5 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

TASK GOALS

- Conduct the external labor market salary survey.
- Provide a summary of the survey results to the CPM.

TASK ACTIVITIES

- 7.1 Prepare a customized external labor market salary survey for the CPM's approval. Discuss questions and categories for the market survey.
- 7.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 7.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 7.4 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 7.5 Validate all data submitted.
- 7.6 Develop summary report of external labor market assessment results.



**Task 8.0
Develop Strategic
Positioning
Recommendations**

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

KEY PROJECT MILESTONES

- Market survey instrument
- Summary report of external labor market assessment results

TASK GOALS

- Assess the appropriateness of the current compensation philosophy for the County.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

- 8.1 Identify the compensation philosophy and accompanying thresholds.
- 8.2 Using the market salary data collected in **Task 7.0**, and the classification data reviewed in **Task 4.0**, determine the proper pay plans for the County.
- 8.3 Identify highly competitive positions within the County and customize recommendations for compensation where required.
- 8.4 Produce a pay plan(s) for the County that best meets its needs from an internal equity and external equity standpoint.

KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account internal and external equity
- Plan for addressing unique, highly competitive positions

**Task 9.0
Conduct Solution
Analysis**

TASK GOALS

- Conduct analysis comparing JAT values.
- Survey results for the benchmark positions.
- Produce several possible solutions for implementation.

TASK ACTIVITIES

- 9.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the County.



**Task 10.0
Develop and
Submit Draft and
Final Reports**

- 9.2 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.
- 9.3 Create implementation solutions for consideration that take into account the current position of the County as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
- 9.4 Meet with the CPM discuss the potential solutions.
- 9.5 Determine the best solution to meet the needs of the County in the short-term and long-term.
- 9.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential solutions
- Documented final solution

TASK GOALS

- Develop and submit a draft and final report of the Employee Classification and Wage Study to Webb County.
- Present the final report.

TASK ACTIVITIES

- 10.1 Produce a comprehensive draft report that captures the results of each previous step. Provide the draft report to the CPM for review and approval. The report will include implementation strategies and the cost associated with implementing all recommendations.
- 10.2 Make edits and submit necessary copies of the final report to the CPM.
- 10.3 Present the final report to the County Commissioner's Court.
- 10.4 Develop a communication plan for sharing study results with employees of the County.
- 10.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports



**Task 11.0
Develop
Recommendations
for Compensation
Administration**

- Final presentation
- Communication plan
- Implementation and maintenance database

TASK GOAL

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

TASK ACTIVITIES

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

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay;
- how often to adjust pay scales and survey the market;
- the timing of implementation; and
- how to keep the system fair and competitive over time.

11.2 Recommend recruitment/retention strategies, where appropriate.

11.3 Present recommendations to the CPM for review.

11.4 Finalize recommendations.

11.5 Develop any training materials to ensure the proper maintenance of the recommended classification and compensation structure.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies



Task 12.0
Provide Revised
Class Descriptions
and FLSA
Determinations

TASK GOALS

- Update existing class descriptions.
- Create new class descriptions as needed, ensuring FLSA and ADA requirement satisfaction.
- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) to the Human Resources Director.

TASK ACTIVITIES

- 12.1 Assess current class descriptions for form, content, validity, and ADA compliance.
- 12.2 Discuss new class description format with the CPM and the Human Resources Director.
- 12.3 Revise classification descriptions based on data gathered from the JAT process.
- 12.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.
- 12.5 Make FLSA determinations based on work performed and federal requirements.
- 12.6 Recommend a systematic, regular process for reviewing job descriptions.
- 12.7 Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word) after approval by the CPM and Human Resources Director.
- 12.8 Develop and provide a classification manual that can be used by the HR Department to evaluate new or revised positions following the conclusion of the study.
- 12.9 Develop any training materials to ensure the proper maintenance of the recommended classification and compensation structure.

KEY PROJECT MILESTONES

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



2.3 Proposed Timeline

Evergreen Solutions possesses the ability, staff, skills, and tools to conduct the Employee Classification and Wage Study for Webb County in four months of the project start date and following the execution of the contract. This is based on a tentative start date of September 1, 2018, and a completion date of December 30, 2018.

Our proposed project timeline, as identified in **Exhibit 2-5**, can be modified in any way to best meet the needs of the County.

**Exhibit 2-5
Project Timeline**

PROJECT TASKS	2018			
	SEPT	OCT	NOV	DEC
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		■	■	
5.0 - Identify List of Market Survey Benchmarks			■	
6.0 - Identify Approved List of Targets			■	
7.0 - Conduct Market Survey and Provide External Assessment Summary			■	
8.0 - Develop Strategic Positioning Recommendations				■
9.0 - Conduct Solution Analysis				■
10.0 - Develop and Submit Draft and Final Reports				■
11.0 - Develop Recommendations for Compensation Administration				■
12.0 - Provide Revised Class Descriptions and FLSA Determinations				■



Section 3.0
Additional Information



3.0 *Additional Information*

The single most important reason you should hire Evergreen Solutions is because of our proven track record in working with hundreds of local governments and other public sector organizations throughout the country that have involved work similar in scope to those being requested by Webb County. Evergreen has an extensive understanding of human resources management given our experiences in this area as identified in **Section 1** of our proposal. The following quotes were taken from some of our clients as they relate to the human resource work we have performed.

“Everyone I was in contact with was extremely professional.”

“Evergreen’s Project Director responded to requests promptly and made every effort to work with the City’s requests.”

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

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

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

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

“Evergreen’s staff were very professional and prompt with responses.”

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

“The Project Director, Dr. Jeffrey Ling, was excellent...It was the best part of working with Evergreen!”

**Dana Tucker, Compensation Manager
Austin Community College, TX**

“I thought the Project Director did an awesome job. She handled everything perfectly!”

**Karen D. U’Halie, Human Resources Director
Mahoning County, OH**

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

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

“I give Evergreen all high marks in meeting stated objectives, flexibility, and quality of materials. We enjoyed working with them”.

**Patrick O. Teague, Director of Human Resources
James City County, VA**



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

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

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

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

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

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

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

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

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

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

“Very impressed with the Project Team”

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

“With regards to the compensation study – job well done. The Evergreen Team did a phenomenal job with the process. The communication and transparency was well noted. Very proud of everyone in what will be a huge step forward for the County!”

**Daniel Prentice, Deputy County Administrator
Dorchester County, SC**

“We appreciate everything Evergreen did for us!”

**Lauren Willis, Human Resources Supervisor
Berkeley County, SC**

“Implemented all of Evergreen’s suggestions.”

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

“Very Happy... Will Definitely use Evergreen Again!”

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



“Evergreen offered us a number of communication tools and great information to keep us on top of the changing human resource world.”

“They made themselves available for phone calls, email inquiries, and site visits time and time again, often with short notice.”

“I know Jeff Ling and the entire Evergreen staff to be excellent service providers and would recommend them highly.”

**Beth Stefek, Director of Human Resources
City of Kissimmee, FL**

“Evergreen maintained frequent interaction and was very accessible.”

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

“Evergreen completed the project within our timeframe.”

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

“Evergreen exceeded our expectations.”

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

“Evergreen’s Project Director was very accessible.”

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

“Evergreen’s Project Director was extremely accommodating. We were very satisfied.”

**Teresa Aguiar, Employee Services Director
Monroe County, FL**

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

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

“Excellent interaction, responsive, and accessible throughout the project.”

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

“I would rate the professionalism of staff very high.”

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



"It was a pleasure working with Evergreen."

**Angelina "Angel" Colonneso
Manatee County Clerk of the Circuit Court and Comptroller**

"Very timely responses."

"Very good people to work with."

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

"Our assigned team was wonderful to work with. They were always available, responsive, and never in a hurry to answer all questions."

**Mercedes Perez, Director of Human Resources & Risk Management
City of Plant City, FL**

"Evergreen is very easy to work with."

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

"Evergreen's staff was professional and responsive."

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

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

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

"Thanks to your consulting leadership, this project has become a smashing success. Congratulations on a job very well done!"

**Tom Mulcahy, Chairman
The Heritage Committee
Town of Colchester, VT**



Section 4.0
Fee Proposal



4.0 Fee Proposal

Evergreen Solutions, LLC is pleased to present our proposed fee to conduct an Employee Classification and Wage Study for Webb County. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable cost. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed fee to complete all tasks identified in our detailed work plan in **Section 2** of our proposal is **\$58,500**. Our fee is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our fee includes up to three onsite visits to Laredo to perform the required services.

The following is our preferred fee invoicing schedule:

- 25% - upon completion of Tasks 1 - 2 of the detailed work plan
- 25% - upon completion of Tasks 3 - 4 of the detailed work plan
- 25% - upon completion of Tasks 5 - 7 of the detailed work plan
- 25% - upon completion of Tasks 8 - 12 of the detailed work plan

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

