

STANDARD SEGAL WATERS CONSULTING CONSULTING AGREEMENT

This Agreement between The Segal Company (Western States) Inc., a **Maryland** corporation, d/b/a Segal Waters (hereinafter “Segal”) and **Webb County, Texas, a political subdivision of the State of Texas acting by and through its Commissioners Court** (the “Client”) is entered into as of **December 1, 2018**.

Accordingly, and in consideration of the mutual premises and provisions hereof, the parties hereby agree as follows:

1. Description of Services

Segal shall provide to the Client the services described in the “**Revised Proposal to Webb County, TX RFP #: 2018-006 Proposal for an Employee Classification and Wage Proposal.**” **The Proposal is annexed hereto as Exhibit “A”** and shall be incorporated by reference as if fully set forth herein.

2. Changes in Scope of Services

Any work requested by the Client that is not included in Exhibit A or any revisions of work requested by the Client shall be subject to a written agreement. Prior to performing any services not contemplated in the Proposal, the parties must reach agreement on the terms of the change(s) and signify their agreement in writing. Any such accepted change shall be attached hereto as an Exhibit to this Agreement.

From time to time, the Client may request or Segal may propose in writing future services. If such proposal is accepted by the parties, then such additional services will be governed by the terms and conditions of this Agreement and any such proposal shall be attached hereto as an Exhibit to this Agreement.

3. Responsibility of Client

a. **Data Request.** Segal will prepare a detailed data request outlining what is necessary to perform these services. Data will be requested in a computer format compatible with Segal’s computer system (being Microsoft Excel and Word) and year 2000 compliant (that is, appears in a four-digit year representation, for example 2004, instead of ‘04).

Upon receipt of the data, Segal will examine it for missing information and internal consistency. There may be additional fees based on hourly time charge rates to convert data not presented in the format requested and for the additional processing time required to reconcile data that contains errors, duplicate records or missing information.

b. **Timely Provision of Information.** Client will assure that its other professionals and vendors cooperate with Segal and provide the information requested or needed by Segal on a timely basis.

4. **Payment Terms**

- a. **Basic Annual Services.** Our annual fee for providing the basic services described in Exhibit A will be \$75,000, commencing **December 1, 2018**.

The proposed fee includes charges for all professional, analytic, and administrative services, as well as all expenses associated with materials, supplies, overhead, and travel for all tasks outlined in this proposal except as otherwise noted.

Our total fixed fee will be billed at the end of each month as follows:

Three (3) equal invoices of \$18,750.00

One payment of \$8,750 at the end of the fourth month and

One final payment of \$10,000.00 within 15 business days of the presentation of the study to the Commissioners Court or 15 business days of the submission of the report to the County, whichever occurs first.

Please note: if the information in the census file is inaccurate additional hourly fees may be charged for data correction and preparation.

Travel expenses for meetings scheduled less than one week in advance will be charged additionally. If a scheduled meeting is cancelled by the client, any non-refundable travel expenses will be billed to the client at cost.

Our proposed fee assumes only the services and on-site meetings described in the proposal. Should the County request additional services or additional on-site meetings, we would charge the hourly rates shown below, as well as for the time and expenses associated with travel.

Staff Member	Title/Role	2018 Hourly Rate
Elliot R. Susseles	Senior Vice President, Practice Leader	\$475
Ruth Ann Eledge	Vice President, Senior Consultant, Project Manager	\$385
Cristy Reetz	Associate Consultant	\$310
Melinda Castellon	Senior Associate	\$275
Holly Waggoner		
Fredericka Ogbazi	Associate	\$225

In the event we are required to spend significantly more time than anticipated because of circumstances beyond our control, we will inform you and bill separately for those services.

If this Agreement is terminated or authorized services or projects are suspended, Segal will be reimbursed for all time charges incurred to the date of termination or suspension, up to a maximum of the fee and travel expenses, incurred up to that date.

- b. **Supplemental and Specialized Consulting Services.** Fees for Specialized Consulting Services and Supplemental Services generally will be charged on a time charge basis or, in some instances, may be charged on a project basis. Segal will provide an estimate of such charges before the work is commenced. The time charges shall be based on Segal's time charge rates unless otherwise agreed to. Supplemental and Specialized Consulting Service charges will be billed monthly in advance unless agreed to otherwise.

Projects Outside the Scope: Fees for projects outside the scope of this Agreement will be mutually agreed upon with the Client before beginning work on the project.

5. **Non-Appropriation**

Funding for this Agreement between the Client and Segal is dependent at all times upon the appropriation of funds by the organization authorized to appropriate such funds. In the event that funding to support this Agreement is not appropriated, whether in whole or in part, then the Agreement may be terminated effective the last day for which appropriated funding is available.

6. **Term of Agreement**

The term of this Agreement shall commence on December 1, 2018 and continue in effect until November 31, 2019 which may be extended upon the agreement of the parties. Segal shall complete the study and final report within the project timeline set forth in Step 4: "Present Final Results to the County" as set forth in the Revised Proposal for an Employee Classification and Wage Study, Revised October 22, 2018 in the attached Exhibit A and incorporated herein by reference for all intents and purposes, but in no event not later than April 30, 2019.

7. **Termination of Agreement**

Either party may terminate this Agreement on thirty (30) days written notice to the other party. Segal will continue to provide services hereunder to the effective date of any such termination and will cooperate with the Client to provide for an orderly transition of the Services to the Client at the time of any such termination. Notwithstanding the foregoing, in the event that the Client is not current in the payment of Segal's invoices at the time that such notice is given, then Segal may choose not to provide Services during the aforementioned thirty (30) day period. Segal will render final billing to the Client after the date of any such termination, and the Client will pay the same in accordance with Section 4.

8. Professional Standards

All Services will be performed by competent personnel with the care, skill, prudence and diligence under the circumstances that a prudent consultant would use in discharging its services and in accordance with applicable professional standards. If any element of the Services does not conform to the foregoing, Segal will re-perform such element in a manner that does conform, except that if such re-performance is impracticable, Segal will refund the fees allocable to such nonconforming element.

9. Confidentiality

Both parties acknowledge that in the negotiation and performance of this Agreement, confidential and proprietary information of each has been and will be made available to the other. The parties agree to use reasonable efforts to maintain the confidentiality of such material, but in no event lesser than was used with like material of the receiving party and not to make any internal use of such material not required or permitted under this Agreement. Neither party will disclose the information to any third party without prior written authorization from the disclosing party. The information received by a receiving party will only be used by those of its employees, agents and consultants whose duties justify the need for access to the information provided and who have agreed to abide by the obligations of secrecy and limited use commensurate in scope with this Agreement. These obligations will apply to verbal information as well as specific portions of the information that are disclosed in writing or other tangible form and marked to indicate its confidential nature. These obligations will not apply to any of the information which:

- i. Was known to the receiving party prior to receipt under this Agreement as demonstrated by the receiving party's records; or
- ii. Was publicly known or available prior to receipt under this Agreement, or later becomes publicly known or available through no fault of the receiving party; or
- iii. Is disclosed to the receiving party without restrictions on disclosure by a third party having the legal right to disclose the same; or
- iv. Is disclosed to a third party by the disclosing party without an obligation of confidentiality, unless such information must be retained by that party for that party to fulfill its legal or agreement obligations under this Agreement; or
- v. Is independently developed by an employee, consultant, or agent of the receiving party without access to the information as received under this Agreement; or
- vi. The receiving party is obligated to produce as required by law, lawfully issued subpoena, or court order, provided that the disclosing party has been given notice thereof and if there is sufficient time, an opportunity to waive its rights to seek a protective order or other appropriate remedy.

To the extent that particular information is subject to specific statutory confidentiality requirements (i.e. Texas Govt. Code, Chapter 5521, Open Records Act), the requirements of such statute, rather than this section, shall be controlling.

10. **Independent Contractor**

Segal is an independent contractor. No provision of this Agreement or act of the parties hereunder pursuant to this Agreement will be construed to express or imply a joint venture, partnership, or relationship other than vendor and purchaser of the services. No employee or representative of Segal will at any time be deemed to be under the control or authority of the Client, or under the joint control of both parties. Segal is liable for all workers' compensation premiums and liability, and federal, state and local withholding taxes or charges with respect to its employees.

11. **Subcontractors**

Any subcontractors to be utilized on this project will be subject to the Client's approval.

12. **No Assignment**

This agreement may not be assigned by either of the parties without the written consent of the other party.

13. **Force Majeure**

Segal will not be liable for any delay in performance or inability to perform due to force majeure, including without limitation any acts of God, acts or omissions of the Client, major equipment failures, fluctuations or non availability of electrical power or telecommunications equipment, or other conditions beyond the control of Segal. If Segal's performance is delayed by force majeure, Segal will discuss the situation with the Client and agree upon an extended period for performance. If an event of force majeure continues for more than thirty (30) days, either party may, at its option, terminate this Agreement and any Statements of Work thereunder. Segal will render a final billing to the Client after the date of any such termination, and Client will pay the same in accordance with Section 4.

14. **Third Party Beneficiaries**

This Agreement is for the benefit of the parties to the Agreement and does not confer any rights or privileges upon any third parties.

15. **Dispute Resolution**

- a. **Mediation.** Any disputes between the parties hereto are subject to non-binding mediation in accordance with the Judicial Arbitration and Mediation Service ("JAMS") as a condition precedent to the commencement of any legal proceeding hereunder.
- b. **Waiver of Jury Trial.** Each party hereby waives any right to a trial by jury in any action, suit, or proceeding arising out of this agreement, or any other agreement or transaction between the parties.
- c. **Notice.** In the event that either party believes that the other party has not complied with its obligations hereunder, such party shall send written notice of such non-

compliance to the other party. In the event that such other party does not cure such non-compliance within thirty (30) days of the date of such notice, then the party sending notice may avail itself of the terms of Section 15A above.

16. Damages

In no event, whether based on contract, indemnity, warranty, tort (including negligence), strict liability, or otherwise, will Segal, or any of its respective directors, officers, employees or agents, be liable for (i) special, incidental, exemplary, punitive, consequential, or indirect damages, including without limitation lost sales, profits or revenue, or claims for such damages, (ii) any losses or damages connected with, or resulting from any software, hardware, or services provided by Segal or any third party.

17. Conflict of Interest

Segal hereby affirms that there are no relevant facts or circumstances now giving rise or which could, in the future, give rise to a Conflict of Interest. A Conflict of Interest means that because of other activities or relationships with other persons, Segal or its subcontractor is unable or potentially unable to render impartial assistance or advice to the Client, or Segal's objectivity in performing the agreement work is or might be otherwise impaired.

If an actual or potential Conflict of Interest arises subsequent to the date of this agreement, Segal shall make a full disclosure in writing to the Client of all relevant facts and circumstances. This disclosure shall include a description of actions that Segal has taken and proposes to take to avoid, mitigate, or neutralize the action or potential conflict of interest. Segal will continue performance of work under the agreement until notified by the Client of any contrary action to be taken.

18. Non-Discrimination

Segal agrees: (a) not to discriminate in any manner against an employee or applicant for employment because of race, color, religion, creed, age, sex, marital status, national origin, ancestry or disability of a qualified individual with a disability; (b) to include a provision similar to that contained in subsection (a), above, in any subcontract except a subcontract for standard commercial supplies or raw materials; and (c) to post and to cause subcontractors to post in conspicuous places available to employees and applicants for employment notices setting forth the substance of this clause.

19. Audit of Segal's Fees

Upon reasonable notice and during normal business hours, the Client reserves the right to audit or cause to be audited Segal's books and accounts with respect to fees and expenses under this Agreement at any time during the term of this Agreement and for three years thereafter except for confidential or proprietary information or trade secrets of Segal or any third party.

20. Notices

All notices, claims, and approvals given under this Agreement must be in writing and delivered in person, by first class or express mail or facsimile addressed a set forth below or such other address that a party gives by notice. Notice given in accordance with this subsection will be deemed given when received.

- a. If to the Client: Mr. Leroy Medford
Commissioners Court Administrator
Webb County Courthouse
1000 Houston St., 2nd floor
Laredo, TX 78040
- b. Copy to: Nathan Bratton
Civil Legal Director
1000 Houston St., 2nd floor
Laredo, TX 78040
- c. If to Segal: Ruth Ann Eledge
Vice President
Segal Waters Consulting
5057 Keller Springs Road, Suite 110
Dallas, TX 75001
- d. Copy to: Margery Sinder Friedman
General Counsel
The Segal Company
333 West 34th Street
New York, NY 10001-2402

21. Amendment or Modification

No amendment or modification of this Agreement shall be valid or binding unless set forth in writing and duly executed by the parties hereunder.

22. Entire Agreement

This Agreement constitutes the entire agreement between the parties hereto with respect to the subject matter hereof and it supersedes all prior oral or written agreements, commitments or understandings with respect to such matters.

23. Severability

The invalidity, in whole or part, of any provision of this Agreement will not affect the remainder of that provision or this Agreement.

24. **Business Associate Agreement**

The parties, if required by law, shall enter into a business associate agreement, which shall be annexed hereto as Exhibit B.

25. **Waiver of Default**

Waiver by a party of any default by the other will not be deemed a waiver of any other default irrespective of whether such default is similar.

26. **Inconsistencies.**

Where there exists any inconsistency between this Agreement and other provisions of collateral contractual agreements that are made a part hereof by reference or otherwise, the provisions of this Agreement shall control.

27. **Headings.**

The headings used herein are for convenience of reference only and shall not constitute a part hereof or affect the construction or interpretation hereof.

28. **-Counterparts.**

This Agreement may be executed in any number of and by the different parties hereto on separate counterparts, each of which when so executed shall be deemed to be an original, and such counterparts shall together constitute but one and the same document.

29. **Terminology and Definitions.**

All personal pronouns used herein, whether used in the masculine, feminine, or neutral, shall include all other genders; the singular shall include the plural and the plural shall include the singular.

30. **Rule of Construction.**

The parties hereto acknowledge that each party and its legal counsel have reviewed and revised this agreement, and the parties hereby agree that the normal rule of construction to the effect that any ambiguities are to be resolved against the drafting party shall not be employed in the interpretation of this agreement or any amendments or exhibits hereto.

31. **Immunity.**

Webb County does not waive or relinquish any immunity or defense on behalf of themselves, their trustees, commissioners, offices, employees and agents as a result of the execution of this Agreement and performance of the functions and obligations described herein.

32. **Legal Compliance.**

The parties hereto agree to comply fully with all applicable federal, state and local statutes, ordinances, rules, and regulations in connection with the programs contemplated under this agreement. This agreement is subject to all applicable present and future valid laws governing the Juvenile Justice Programs applicable to school district and/or County Juvenile Probation Departments. In the event that any of the parties hereto are required by law or regulation to perform any act inconsistent with this agreement, or to cease performing any act required by this agreement, this agreement shall be deemed to have been modified to conform with the requirements of such law, regulation or rule.

33. **Construction of Laws and Jurisdiction of Courts**

This Agreement will be governed in all respects by the laws of **Texas**, without regard to any conflicts of law principle, decisional law, or statutory provision, which would require or permit the application of another jurisdiction’s substantive law and shall be enforced in Webb County, Texas.

34. This Agreement becomes effective when signed by the last party whose signing makes the Agreement fully executed.

35. **Duly Authorized Signatures**

For the Client:

The undersigned, **Honorable Tano E. Tijerina, County Judge of Webb County, TX** and as such has been duly authorized by the Client to sign this Agreement on behalf thereof.

For Segal:

The undersigned **Ruth Ann Eledge** is **Vice President** of Segal and as such is duly authorized to sign this agreement in behalf thereof, thereby binding Segal to the provisions of this Agreement.

In Witness Whereof, the parties have executed this Agreement as of the date hereinabove set forth.

WEBB COUNTY, TEXAS

Date

By: Tano E. Tijerina
Webb County Judge

Witness

THE SEGAL COMPANY (Western States) Inc., d/b/a Segal Waters Consulting

Date

By

Witness

ATTEST:

Margie Ramirez Ibarra
Webb County Clerk

Approved as to Form:

Nathan R. Bratton
General Counsel
Civil Legal Division*

*The General Counsel, Civil Legal Division's office, may only advise or approve contracts or legal documents on behalf Webb County, its client. It may not advise or approve a contract or legal document on behalf of other parties. Our review of this document was conducted solely from the legal perspective of our client. Our approval of this document was offered solely for the benefit of our client. Other parties should not rely on this approval, and should seek review and approval of their own respective attorney(s).



Webb County, TX

**Revised Proposal for an Employee
Classification and Wage Study**

RFP #: 2018-006

Revised Date: October 22, 2018

Contact:

Ruth Ann Eledge, SPHR
Vice President/Project Manager
214.930.7291
reledge@segalco.com

a) Cover Letter

Segal Waters Consulting

THE SEGAL COMPANY (WESTERN STATES) INC.
SEGAL WATERS CONSULTING
5057 Keller Springs Road, Suite 110, Addison, TX 75001
T 214.466.2450 F 214.481.0460 www.segalco.com

October 22, 2018

Juan Guerrero
Contract Administrator
Webb County Purchasing Department
1100 Washington Street, Suite 1010
Laredo, TX 78040

Re: Revised Proposal for RFP #: 2018-006, Consulting Services for an Employee Classification and Wage

Dear Mr. Guerrero:

Thank you for the opportunity to submit this revised proposal for an employee classification and wage study for Webb County (“County”). Through our extensive experience providing human resources advice to public sector clients nationwide, we think Segal Waters is best qualified to assist you with this project. Some of our clients in the State of Texas include the City of Fort Worth, City of Garland, City of League City, City of San Marcos, and City of Wylie.

Currently, we are providing human resources consulting services to Texas clients including Austin Energy (City of Austin), City of Bryan, City of College Station, City of Houston, City of San Antonio, Employees Retirement System of Texas, and Trophy Club Municipal Utility District.

We appreciate your consideration for this assignment and welcome the opportunity to meet with you to answer any questions you have. We are enclosing the following documents in this package:

- Proposal Checklist
- Proposer Information
- 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

As an officer of the firm, I am authorized to bind the firm in a contract. Please feel free to contact me by phone at 214.930.7291 or by email at reledge@segalco.com.

Sincerely,



Ruth Ann Eledge, SPHR
Vice President and Project Manager

b) Table of Contents

Webb County, TX

RFP #2018-006 for an Employee Classification and Wage Study

Revised October 22, 2018

a) Cover Letter	1
b) Table of Contents.....	2
c) Executive Summary	3
d) Description of Relevant Experience and Qualifications.....	5
About Our Company.....	5
Company History and Staff	6
Summary of Segal Services	8
Segal Waters Consulting.....	10
References	23
Segal Waters Consulting Client List.....	26
e) Technical Proposal	28
Step 1: Project Initiation and Classification Study	28
Step 2: Wage/Compensation Study.....	36
Step 3: Recommendations Development.....	44
Step 4: Present Final Results to the County.....	49
Project Timeline.....	49
f) Attachments	50
g) Fee Proposal	51

c) Executive Summary

Segal Waters Consulting has offered human resources consulting services dedicated to our public sector clients since 1997. We help organizations adopt a more strategic, comprehensive and integrated approach to total rewards that includes both financial and nonfinancial rewards. Our services include:

- Human Resources functional assessments
- Total compensation market studies
- Total compensation system design and implementation
- Job classification analyses
- Job evaluation system design and implementation
- Performance management system design and implementation
- Employee opinion surveys
- Cost modeling

Our consulting approach is based on customized solutions to meet specific needs, not “off-the-shelf” systems. Our goal is to maximize the value of total rewards by encouraging employee participation in our engagements. This is crucial to a successful outcome.

Segal Waters Consulting has been conducting classification and compensation studies for Texas governmental entities for 20 years. The following is a sample of the projects we have conducted within the State of Texas during the last few years:

Name of Governmental Entity	Dates of Service
Austin Energy	2013, 2018
Bexar County Juvenile Probation Dept.	2017 - 2018
Center for Health Care Services (Bexar County)	2018
City of Bryan	2018
City of College Station and City of Bryan	2015
City of College Station	2017
City of Fort Worth	2014 - 2016
City of Garland	2017
City of Houston	1998 - present
City of League City	2017
City of Missouri City	2012 - 2015
City of San Antonio	2018
City of San Marcos	2013, 2016
City of Wylie	2013 - 2017
Collin County Community College District	2014
Denton County Transportation Authority	2015 - 2016
Employees Retirement System of Texas	2018
New Braunfels Utilities	2012, 2015, 2016
Port of Houston Authority	2016

As the largest County in South Texas, Webb County’s “service area” is 3,361 square miles with approximately 260,000 residents. The County, which borders Mexico, is uniquely situated and provides a wide range of government services including the following:

Department	
Constables' Office	Fire Department
County Auditor	Purchasing
County Jail	Road and Bridge
County Treasurer	Tax Office
Engineering	State Judicial Courts

Webb County’s current classification and wage system has been in place since fall 2014. We understand the County desires to secure an updated classification and wage study to determine if employees are being properly compensated and whether their positions are in alignment with the surrounding current market. The County has 824 full-time employees, 590 of whom are civil service employees, represented by 475 job titles. Specifically, we understand the scope of this study is to develop and implement a classification and wage plan that will:

- 36. Ensure positions performing a similar level of work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together
- 37. Provide salaries commensurate with assigned duties
- 38. Provide justifiable pay differential between grades/levels
- 39. Ensure salaries are current with relevant job markets

Our proposed work plan for this assignment includes the following steps.

- Step 1: Project Initiation and Classification Study
- Step 2: Wage/Compensation Study
- Step 3: Recommendations Development
- Step 4: Present Final Results

We have described each project step in more detail in **Section E: Technical Proposal**.

d) Description of Relevant Experience and Qualifications

About Our Company

The Segal Group (www.segalco.com) has been a leading, independent firm of benefit, compensation, and human resources consultants since its founding in 1939. Our clients include corporations, non-profit organizations, higher education institutions, professional service firms, and public sector entities, and jointly trustee benefit funds.

Segal is an independent, employee-owned organization with no ties to any other companies. Our only interest is in providing unbiased solutions to clients' total rewards needs.

Our firm is headquartered in New York and has more than 1,000 employees working in the following offices throughout the U.S. and Canada.

Atlanta, GA	Glendale, CA	Philadelphia, PA
Boston, MA	Hartford, CT	Phoenix, AZ
Chicago, IL	Houston, TX	Princeton, NJ
Cleveland, OH	Los Angeles, CA	Raleigh, NC
Dallas, TX	Minneapolis, MN	San Francisco, CA
Denver, CO	Montreal, QC	Toronto, ON
Detroit, MI	New Orleans, LA	Washington, DC
Edmonton, AB	New York, NY	

Segal has extensive experience in providing independent, results-driven consulting services to public sector entities throughout the country.

For more than 75 years, we have developed cutting-edge total rewards approaches that provide quality health care, secure retirement, and competitive compensation programs for our clients' employees. Offering comprehensive total compensation and benefits packages requires governments to continually search for cost efficiencies and innovations. Many widely accepted benefit practice and cost containment solutions were originally designed by Segal.

Company History and Staff

The Segal Group was founded as the Martin E. Segal Company in October 1939, early in the development of employee benefit plans in American industry. From the beginning, Segal has been involved in developing health and retirement programs that meet the needs of employees and employers.

In 1967, the Martin E. Segal Company became part of Wertheim & Co. and in 1978 it again became independent when it was repurchased by company management.

In 2001, The Segal Group acquired Marjorie Gross and Company, an award-winning firm specializing in communicating benefits and compensation information, as well as building strategies for effective employer communications.

Early in 2002, The Segal Group acquired Sibson Consulting, a human resources consulting firm dedicated to helping companies improve the return on human capital through talent strategies, effective organization practices, change management, rewards and compensation design, work/life programs and other solutions that help enhance employee performance.

In 2006, The Segal Group acquired Irwin Tepper Associates, Inc., a consulting firm that specializes in asset/liability analysis for employee benefit programs and other organizations.

In 2010, The Segal Group acquired Aon Consulting's multiemployer defined benefit plan and related consulting business in the United States.

In 2012, The Segal Group's investment consulting affiliate, Segal Rogerscasey, acquired Rogerscasey, a global investment consulting firm. The combined entity (Segal Rogerscasey) is a leading global investment solutions firm that provides innovative, client-driven consulting advice and outsourcing solutions. The firm has been in operation for more than 40 years and is one of the largest U.S.-based investment consultants.

In 2013, The Segal Group's Fiduciary Liability Insurance Practice was incorporated as the insurance brokerage subsidiary of The Segal Group, Inc., and named Segal Select Insurance Services, Inc. Segal Select works with plan sponsors to obtain a full range of fiduciary insurance and fidelity bond coverage as well as employment practices liability insurance and cyber liability coverage.

In 2014, The Segal Group acquired the Human Resources Consulting Division of Waters Consulting and combined it with Segal's Public Sector Compensation and Bargaining Practice. The combined entity, Segal Waters Consulting, provides compensation and human resources consulting solutions to public sector entities.

Also in 2014, The Segal Group acquired a portion of the business of Moroni Fantin, an employee benefits consulting firm (which has now ceased operations) specializing in working with Michigan and national, mid-market, self-insured health plans.

In 2017, Segal Rogerscasey (SRC) acquired Marco Consulting Group (MCG) combining our investment, research and consulting strengths. The combined firm has been renamed Segal Marco Advisors.

In 2018, The Segal Group acquired The Singer Group, with more than 30 years of experience including library systems and non-profits nationwide to expand Segal Waters Consulting compensation and human resources consulting practice.

The Segal Group is a founding member of the Multinational Group of Actuaries and Consultants (MGAC), whose member companies across the world meet clients' needs for assistance in international benefits planning.

Segal Consulting, Sibson Consulting, Segal Marco Advisors and Segal Select are all members of The Segal Group. While company names and logos have evolved over the firm's 75 year history, members of The Segal Group remain independent, employee-owned firms that provide unbiased consulting.

The Segal Group is a private corporation owned by its active officers, with no shareholder owning more than 5% of the common stock. Our firm's chief officers are:

- Joseph Lo Cicero – Chairman
- John DeMairo – Vice Chairman
- David Blumenstein – President and Chief Executive Officer
- Ricardo DiBartolo – Senior Vice President, Chief Financial Officer and Treasurer
- Margery Sinder Friedman, Esq. – Secretary and General Counsel

Summary of Segal Services

Segal is a completely independent organization with no ties to any other companies. Our only interest is in providing unbiased solutions to clients' total rewards needs. Visit us at www.segalco.com.

Our comprehensive array of results-driven consulting and actuarial services includes strategic planning and program designs that align human resources strategies with staffing needs. Segal serves three distinct markets—Public Sector, Corporate and Multiemployer—with services, staff and expertise available to consult on the full range of health, retirement, and compensation issues in each of these markets.

➤ **Human Resources Consulting**

- Total compensation philosophy development
- Total rewards system design and implementation
- Customized compensation market assessments and cost modeling
- Classification studies and job description development
- Job evaluation and internal equity analyses
- Performance Management
- Employee opinion surveys to support reward system design
- Collective bargaining support

➤ **Health and Welfare Plan Consulting**

- Medical, dental, disability, prescription drug and vision benefits plan design
- Valuation of retiree health plan liabilities and obligations according to GASB (Governmental Accounting Standards Board)
- Cost management strategies
- Financial forecasting and trend analysis
- Plan trend and industry benchmarking
- Plan administration and compliance strategies
- Vendor selection, contracting, and management services
- Quality performance standards

➤ **Retirement Plan Consulting**

- Defined benefit and defined contribution consulting
- Actuarial valuations and audits
- Supplemental savings plans 457, 403(b), 401(k)
- Deferred Retirement Option Plans and Partial Lump Sum Plans

➤ **Compliance Consulting**

- Preparation and review of plan documents, enrollment information, and participant correspondence
- Internal Revenue Code, state and local law, and GASB compliance
- HIPAA assessment, compliance and training programs
- SPD (Summary Plan Descriptions) review, drafting, and redesign

- **Claims Audit Consulting**
 - Analysis of medical, dental, disability, vision, and/or prescription drug claims administration and transaction processes
 - Assurance of financial and procedural accuracy in compliance with plan provisions and timeliness of claims adjudication
 - Review of insurance carriers, third party administrators, and self-administered plans

- **Communications Consulting**
 - Communications assessments, employee research, strategic planning
 - Organizational change communications
 - Compensation and performance management communications
 - Personalized communications and benefit statements
 - Web site content development and design

- **Administrative and Technology Consulting**
 - Review of strategic initiatives and business objectives
 - Assessment of administrative processes, organizational structure, and operational technology
 - Feasibility studies of administrative alternatives
 - Process re-engineering
 - Technology assessment, acquisition, and
 - Implementation

- **Investment Consulting** (through our SEC-registered affiliate, Segal Marco Advisors)
 - Asset Allocation and Investment Strategies
 - Asset/Liability Modeling (ALM)
 - Manager Searches
 - Performance Measurement
 - Alternative Investment Research
 - Fiduciary Services
 - Model Portfolios
 - MasterManagerSM
 - Strategy-Specific Hedge Fund Portfolios
 - Retire Funds
 - Defined Contribution Services and Vendor Searches

Segal Waters Consulting

Segal Waters Consulting has offered human resources consulting services dedicated to our public sector and collectively bargained clients since 1997. We help organizations adopt a more strategic, comprehensive and integrated approach to total rewards that includes both financial and nonfinancial rewards.

Our consulting approach is based on customized solutions to meet specific needs, not “off-the-shelf” systems. Our goal is to maximize the value of total rewards by encouraging employee participation in our engagements. This is crucial to a successful outcome.

Our services include:

Human Resources Functional Assessments

We conduct assessments of all activities that support human resources. This includes evaluating the staffing, effectiveness of payroll, compensation, benefits, classification, recruitment and selection, training, employee relations, civil service rules, regulations and procedures. Our approach identifies strengths and weaknesses that impact effective human resources management.

Total Compensation Market Studies

We conduct total compensation market analyses targeted to specific comparable employers. This process identifies benchmark positions that are representative of an employer’s workforce. The surveys capture information on pay ranges, maximum hiring pay rates, pay progression policies, performance-based reward systems, paid time off, health and welfare related benefits, and retirement benefits. As a routine part of any project, Segal Waters provides clients with all detailed source data received through our surveys.

Total Compensation System Design and Implementation

We design total reward systems by working with clients to develop compensation philosophies that support organizational strategic goals and compensation best practices. We frequently work with clients to transform longevity-based pay programs to performance-based systems. Additionally, we often work with our clients in a joint labor-management environment to facilitate and communicate reward system changes.

Job Classification Analyses

Classification studies include development and analysis of position questionnaires and employee interviews as the basis for evaluating and streamlining the classification structure. Additionally, we can assist in developing customized job descriptions that are consistent with legislation such as FLSA and ADA.

Job Evaluation System Design and Implementation

Our **Segal Evaluator™** point-factor method of job evaluation is easily understood and provides an internal hierarchy based on established factors common to jobs throughout the organization. This approach determines the eight specific compensable factors customized to support the operating environment and organizational structure of each client.

Performance Management

Based on an organization's compensation strategy, we will develop a performance management approach that includes tools to measure individual and group performance as well as tie the performance management system to a pay delivery approach.

Employee Opinion Surveys

As part of evaluating total compensation programs, we frequently design and implement opinion surveys to measure employees' preferences and priorities regarding all aspects of their rewards of work (direct compensation, paid leave, benefits programs, work environment, career opportunities, affiliation with the organization, and other aspects). Our analysis can include comparisons of demographic groups, highlighting differences by occupational categories, career stage, or other groupings. In addition, we often conduct employee engagement surveys to understand employees' level of motivation and morale, turnover potential, and other measurable aspects of commitment and engagement with the organization.

Cost Modeling

Most reward system redesigns result in a fiscal impact to the employer. Our modeling approach not only identifies the immediate impact of implementation, but also provides a multi-year perspective to identify steady employer costs.

Segal Waters' Project Team

We bring to this project an excellent combination of skills and experience in public sector compensation and classification analysis and design.

The Segal Waters project team consists of experienced consultants who are dedicated to meeting the needs of the County in a manner that is cost efficient, timely, and of high quality. Our team has relevant advanced degrees and professional certifications including:

- Certified Compensation Professional (CCP) through WorldatWork
- Senior Professional in Human Resources (SPHR) through the Society for Human Resources Management (SHRM)

Staff Member	Role
Elliot R. Susseles, CCP	National Practice Leader
Ruth Ann Eledge, SPHR	Senior Consultant, Project Manager
Cristy Reetz*	Associate Consultant
Melinda Castellon	Senior Associate
Holly Waggoner*	
Fredericka Ogbazi*	Associate

* Many of our team members are working towards obtaining Certified Compensation Professional (CCP) designation through WorldatWork.

We invite you to review the resume of each team member on the following pages.

Expertise

Mr. Susseles joined the firm in 1992. He serves as Segal's National Practice Leader for Segal Waters Consulting. As a member of Segal's Public Sector Leadership Group, Mr. Susseles collaborates with benefits related Practice Leaders to shape Segal's total rewards consulting philosophy.

Clients

Federal Agencies

Administrative Office of the U.S. Courts
U.S. Office of Personnel Management

State Agencies

State of Alaska
State of Arizona
State of Colorado
State of Colorado Judiciary
State of Georgia, Dept. of Audits & Accounts
State of Iowa
State of Maine Judiciary
State of Maryland, Dept. of Budget & Management
State of Maryland Judiciary
Commonwealth of Massachusetts, Treasurer & Receiver
State of Minnesota Judiciary
State of New Jersey Judiciary
State of North Carolina
State of Ohio Judicial Branch
State of Rhode Island
State of Tennessee
State of Vermont Judiciary
State of Washington
Government of the District of Columbia

Counties

Anne Arundel County (MD)
Arlington County (VA)
Barry County (MI)
Bay County (MI)
City/County of Denver (CO)
Fairfax County (VA)
Forsyth County (GA)
Kenosha County (WI)
Isabella County (MI)

Macomb County (MI)
Minnehaha County (SD)
Mohave County (AZ)
Oakland County (MI)
Pinal County (AZ)
Spotsylvania County (VA)

Municipalities

City of Baltimore (MD)
City of Boston (MA)
City of Bristol (CT)
[City of Carrollton \(TX\)](#)
City of Fort Lauderdale (FL)
City of Gaithersburg (MD)
City of Grand Rapids (MI)
[City of Houston \(TX\)](#)
City of Knoxville (TN)
City of Phoenix (AZ)
City of North Kansas City (MO)
City of Raleigh (NC)
[City of San Marcos \(TX\)](#)
City of Sioux Falls (SD)
City of Seattle (WA)
City of Sedona (AZ)
City of Sioux Falls (SD)
City of Solon (OH)
City of Wilmington (DE)

Public Utilities

Birmingham Water Works Board (AL)
Des Moines Water Works (IA)
Denver Water (CO)
DC Water & Sewer Authority
Easton Utilities Commission (MD)
Metropolitan District Commission (CT)
Prince William County Service Authority (VA)

Transportation

Central Ohio Transit Authority
Des Moines Area Regional Transit (IA)
Hillsborough Area Regional Transit Authority (FL)
Jacksonville Transportation Authority (FL)
Lehigh Northampton Airport Authority (PA)
Massachusetts Bay Transportation Authority
Massachusetts Department of Transportation
Metro St. Louis (MO)
National Railway Labor Conference
New Jersey Turnpike Authority
Orange County Transportation Authority (CA)
Port Authority of Allegheny County (PA)
[Port of Houston Authority \(TX\)](#)
Regional Transit District (CO)
San Francisco Bay Area Rapid Transit (CA)
Southeast Louisiana Transit Authority
Virginia Railway Express (VA)
Washington Metropolitan Area Transit Authority (DC)

K-12 School Districts

Adams 12 School District (CO)
Arlington Public Schools (VA)
Boulder Valley Public Schools (CO)
Denver Public Schools (CO)
East Baton Rouge Parish School System (LA)
Jefferson County Public Schools (CO)
Lafayette Parish School System (LA)
Prince George's County Public Schools (MD)
Prince William County Public Schools (VA)

Other Public Agencies

Cuyahoga Library District (OH)
Ohio Public Employees Retirement System
Las Vegas – Clark County Library District

Professional Background

Prior to joining Segal, Mr. Susseles served as Associate Director of Labor Relations for the District of Columbia where he was responsible for the District's labor economics program in support of negotiations.

He has extensive experience in government finance and human resources including having worked for the Washington Metropolitan Area Transit Authority as a labor economist and with the New York City Transit Authority as Chief of the Office of Labor and Cost Analysis. Mr. Susseles served as Assistant Director of Research and Negotiations for a major public sector union.

Mr. Susseles has served on the adjunct faculty of the City University of New York, The New School University, USDA Graduate School, Kingsborough Community College, and Prince Georges Community College.

Education/Professional Designations

Mr. Susseles graduated from Hofstra University with a B.A. in Economics and from New York University with an M.A. in Economics. He is a member of WorldatWork and the International Personnel Management Association – Human Resources (IPMA-HR). He is a Certified Compensation Professional (CCP).

Published Works/Speeches

“State of Public Pensions and Its Impact on Collective Bargaining,” 2016 National Center for the Study of Collective Bargaining in Higher Education and the Professions.

“Total Compensation, Cost Versus Value,” IPMA-HR 2015 National Conference

- “Maintaining competitiveness in Tough Economic Times,” NASPE 2010 National Conference
- “Managing through Fiscal Stress,” IPMA-HR 2009 Training Conference.
- “Eight Steps to Instituting a Successful Reduction in Force, and One Interesting Alternative,” IPMA-HR News, February 2009.
- “How Employees Value the Rewards of Their Work: Results from Segal’s 2007 Public Sector Rewards of WorkSM,” IPMA-HR Conference, October 2007.
- “It’s Not Just About Pay,” IPMA-HR News, June 2006.
- “The Key Role of Labor-Management Committees in Achieving Successful Negotiations,” *IPMA-HR News*, August 2003.

Expertise

Ruth Ann Eledge is a Vice President of Segal Waters Consulting. In this role, she leads and oversees many of our Human Resources studies and compensation projects and works closely with the entire consulting team to ensure on-time delivery while meeting the quality requirements of our clients.

Clients

Counties

Bandera County Appraisal District (TX)
Comal County (TX)
Gillespie County (TX)
Harris County Appraisal District (TX)
Howard County (MD)
Jackson County (TX)
Jefferson County (CO)
Lake County (IL)
Lincoln County (SD)
Macomb County (MI)
McKinley County (NM)
Montrose County (CO)
Pointe Coupee Parish (LA)
Terrebonne Parish (LA)
Santa Barbara County (CA)
Shelby County (TN)

Public Utilities

Austin Energy (TX)
Colorado Springs Utilities
Columbus Water Works (GA)
Floresville Electric (TX)
Greenville Utilities Commission (NC)
Guadalupe Brazos River Authority (TX)
Karnes Electric Cooperative, Inc. (TX)
New Braunfels Utilities (TX)
Orange Water and Sewer District (NC)
San Miguel Electric Cooperative, Inc. (TX)
Texas Municipal Power Agency (TX)
Toho Water Authority (FL)

Other Public Agencies

Anderson Public Library (IN)
CareerSource Palm Beach County (FL)
Indianapolis-Marion County Library System (IN)
Kansas City, Kansas Housing Authority

Municipalities

City of Addison (TX)
City of Auburn (AL)
City of Avondale (AZ)
City of Austin (TX)
City of Beeville (TX)
City of Bryan (TX)
City of Cedar Hill (TX)
City of Chandler (AZ)
City of Chapel Hill (NC)
City of Charlotte (NC)
City of Cibolo (TX)
City of College Station (TX)
City of Colorado Springs (CO)
City of Crowley (TX)
City of Danville (VA)
City of Edinburg (TX)
City of Farmers Branch (TX)
City of Fort Worth (TX)
City of Fountain (CO)
City of Goleta (CA)
City of Granbury (TX)
City of Grand Rapids (MI)
City of Greenville (NC)
City of Greenville (SC)
City of Groves (TX)
City of Hondo (TX)
City of Houston (TX)
City of League City (TX)
City of Lynnwood (WA)
City of Mandeville (LA)
City of Maricopa (AZ)
City of Marana (AZ)
City of Mesquite (TX)
City of Missouri City (TX)
City of Mont Belvieu (TX)
City of Morgantown (WV)

[Montgomery County 911 \(TX\)](#)
North Carolina Education Lottery
North Little Rock Housing Authority (AR)
Recreation & Park Commission for the Parish
of East Baton Rouge (LA)
[Tarrant County 911 \(TX\)](#)

Pension/Retirement Systems

[Austin Employee Retirement System \(TX\)](#)
[El Paso City Employees' Pension Fund \(TX\)](#)
Fire and Police Pension Association of
Colorado
State Universities Retirement System of
Illinois (SURS)
Teacher's Retirement System of Illinois (TRS)
[Texas Association of Public Employee
Retirement Systems \(TEXPERS\)](#)

Transportation

Capital District Transit Authority (CDTA)
(NY)
City of Charlotte (NC) - Airport Authority
C-TRAN (WA)
Columbus Regional Airport Authority (OH)
Jacksonville Port Authority (FL)
Metropolitan Nashville Airport Authority (TN)
[Port of Houston Authority \(TX\)](#)
Raleigh-Durham Airport Authority (NC)
Sacramento Regional Transit District (CA)

City of Oklahoma City (OK)
City of Oro Valley (AZ)
City of Overland Park (KS)
City of Palo Alto (CA)
[City of Pecos City \(TX\)](#)
City of Peoria (IL)
[City of Portland \(TX\)](#)
[City of Round Rock \(TX\)](#)
[City of San Antonio \(TX\)](#)
City of San Marcos (CA)
City of Sierra Vista (AZ)
City of Simpsonville (SC)
[City of Sugar Land \(TX\)](#)
City of Thibodaux (LA)
City of Thornton (CO)
[City of Tyler \(TX\)](#)
City of Upper Arlington (OH)
[City of Victoria \(TX\)](#)
[City of West University Place \(TX\)](#)
[City of Wylie \(TX\)](#)
City of York (PA)
[Town of Highland Park \(TX\)](#)
Village of Winnetka (IL)

Higher Education

[College of the Mainland \(TX\)](#)
[Collin County Community College \(TX\)](#)
Harford Community College (MD)
[Lamar University \(TX\)](#)
Northeast Community College (NE)
[Texas A & M University – Libraries](#)

[Professional Background](#)

Prior to joining Segal, Ms. Eledge worked at The Waters Consulting Group, one of the most experienced firms in public sector human resources and compensation consulting, which was acquired by Segal in 2014. Before joining Waters Consulting Group in 2000, Ms. Eledge served as the City of Austin's Director of Human Resources and Civil Service. Under her leadership, the City received an A+ rating from Governing Magazine for having a top Human Resource Department in 2000, an honor given only to two cities nationwide. Ms. Eledge has worked closely with various boards and commissions for the City of Austin, Texas, including the Civil Service Commission, Human Rights Commission, Mayor's Committee for Persons with Disabilities, and the City Council Affirmative Action Subcommittee.

[Education/Professional Designations](#)

Ruth Ann received her Master's degree (MPA) from Southwest Texas State University and her Bachelor's degree from the University of Texas at Austin.

Expertise

Cristy Reetz develops custom compensation programs to meet our client's strategic goals and philosophy. In her time with Segal Waters, Cristy has worked on numerous cases involving classification, compensation, job evaluation, FLSA, organizational, and staffing analyses.

Clients

State Agencies

State of Colorado Judicial Branch
State of Maine Judicial Branch
State of Minnesota Judicial Branch
State of Vermont Judicial Branch
State of Washington
Supreme Court of Ohio

Counties

Anderson County (SC)
Barry County (MI)
Boulder County (CO)
[Bandera County Appraisal District \(TX\)](#)
Coconino County (AZ)
Deschutes County (OR)
[Harris County Appraisal District \(TX\)](#)
Isabella County (MI)
[Jackson County \(TX\)](#)
[Johnson County \(TX\)](#)
Lake County (IL)
Lexington County (SC)
Lincoln County (SD)
Macomb County (MI)
McKinley County (NM)
Santa Barbara County (CA)
Shelby County (TN)
Waukesha County (WI)

Public Utilities

Colorado Springs Utilities
Columbus Waters Works (GA)
Denver Water (CO)
[Floresville Electric \(TX\)](#)
[Kerrville Public Utilities \(TX\)](#)
Prince William County Service Authority (VA)
Toho Water Authority (FL)

Municipalities

[City of Addison \(TX\)](#)
City of Auburn (AL)
City of Avondale (AZ)
[City of Bryan \(TX\)](#)
City of Charlotte (NC)
[City of College Station \(TX\)](#)
City of Colorado Springs (CO)
City of Concord (NC)
City of Durham (NC)
[City of Edinburg \(TX\)](#)
City of Fort Lauderdale (FL)
[City of Fort Worth \(TX\)](#)
City of Goleta (CA)
City of Goodyear (AZ)
[City of Granbury \(TX\)](#)
City of Grand Rapids (MI)
[City of Gun Barrel City \(TX\)](#)
City of Lynnwood (WA)
City of Mandeville (LA)
City of Marana (AZ)
City of Maricopa (AZ)
City of Missoula (MT)
[City of Missouri City \(TX\)](#)
[City of Pecos City \(TX\)](#)
City of Peoria (IL)
City of Pittsburgh (PA)
City of Poway (CA)
City of Prescott (AZ)
[City of Round Rock \(TX\)](#)
City of Santa Cruz (CA)
City of Sioux Falls (SD)
[City of Wylie \(TX\)](#)

Higher Education

[Collin County Community College \(TX\)](#)
Texas A & M University – Libraries

Transportation

Bay Area Rapid Transit (CA)
City of Charlotte (NC) - Airport Authority
Columbus Regional Airport Authority (OH)
Hillsborough Area Regional Transit (FL)
Indianapolis Public Transportation (IN)
Jacksonville Aviation Authority (FL)
Lincoln Airport Authority (NE)
Metropolitan Nashville Airport Authority (TN)
Niagara Frontier Transit Authority (NY)
[Port of Houston Authority \(TX\)](#)
Raleigh-Durham Airport Authority (NC)
Victor Valley Transit Authority (CA)

K-12 School Districts

Arlington Public Schools (VA)

Other Public Agencies

Anderson Public Library (IN)
CareerSource Palm Beach County (FL)
Central Arizona Project
North Carolina Education Lottery
North Little Rock Housing Authority (AR)
Recreation & Park Commission East Baton
Rouge (LA)

Pension/Retirement Systems

[Texas Association of Public Employee
Retirement Systems \(TEXPERS\)](#)
Teacher's Retirement System of Illinois

Professional Background

Cristy's background includes a logistics position on a U.S. Senate campaign, assisting a former St. Paul, MN mayor and performing multiple administrative and project related duties for The League of Women Voters Minnesota, whose work focuses on public interest lobbying and voter service.

Education/Professional Designations

Cristy Reetz received her B.A. in Social Science from Metropolitan State University in St. Paul, MN. Her major emphasis being research methodologies in Political Science, including successful completion of a capstone project involving Comparative Politics and Employment Legislation. Cristy is a member of WorldatWork and is in process of attaining her Certified Compensation Professional (CCP) designation.

Expertise

Mrs. Castellon joined Segal Waters Consulting in November 2017. She performs complex analytical work for total compensation market studies and job classification analysis.

Clients

Municipalities

City of Fort Worth (TX)

Higher Education

Butler Community College (KS)

University of Connecticut

Transportation

Fort Wayne Allen-County Airport Authority (IN)

Other Public Agencies

Bexar County Juvenile Probation Department (TX)

Employees Retirement System of Texas

Spokane Regional Health District (WA)

Professional Background

Before joining Segal Waters, as a Training and Development Manager for the University of New Orleans, Melinda was responsible for development, implementation and delivery of all training and professional development programs university-wide. Melinda has had extensive experience in design and implementation of classification and compensation plans as a Human Resources Analyst at the University Medical Center in New Orleans, LA.

Education

Melinda earned a Bachelor's degree in Psychology from McNeese State University and a Master's degree in Industrial Psychology from Louisiana Tech University.

Expertise

Holly joined Segal Waters Consulting in August 2016 as a Compensation Analyst within their consulting group. She performs analytical work for total compensation market studies and job classification analysis.

Clients

Counties

County of Santa Barbara (CA)
Shelby County Government (TN)
Waukesha County (WI)

Municipalities

City of College Station (TX)
City of Fort Lauderdale (FL)
City of Houston (TX)

Transportation

Columbus Regional Airport Authority (OH)
Washington Metropolitan Area Transit Authority (DC)

Utilities

Columbus Water Works (GA)
Orange County Utilities (FL)

Professional Background

Before joining Segal Waters, Holly worked as a Compensation Analyst for Tenet Healthcare, a multinational healthcare services company based in Dallas, where she provided analytical support to multiple hospital and related entities across the United States in the design, implementation, and monitoring of compensation programs for union and non-union employee groups.

Prior to her work with Tenet Healthcare, Ms. Waggoner served as an Associate within KPMG's Advisory Services practice focusing on banking and energy-services clients. While there, she assisted a variety of Fortune 500 firms in addressing functional challenges through strategy revisions, reconsidered business models, and remediation efforts.

Education

Holly earned a Bachelor's degree from Indiana University in Bloomington.

Expertise

Mrs. Ogbazi joined Segal Waters Consulting in January 2016. She performs analytical work for total compensation market studies and job classification analysis.

Clients

State Agencies

Supreme Court of Ohio

Counties

Bay County (MI)

Deschutes County (OR)

Isabella County (MI)

Macomb County (MI)

Santa Barbara County (CA)

Public Utilities

Colorado Springs Utilities (CO)

Toho Water Authority (FL)

K-12 School Districts

Fairfax County Public Schools (VA)

Municipalities

City of Goodyear (AZ)

City of Grand Rapids (MI)

City of Greenville (NC)

City of Olathe (KS)

[City of San Antonio \(TX\)](#)

City of San Marcos (CA)

City of Sioux Falls (SD)

Transportation

Jacksonville Aviation Authority (FL)

Lincoln Airport Authority (NE)

[Port of Houston Authority \(TX\)](#)

Professional Background

Before joining Segal Waters, Fredericka worked as proposal assistant supporting the department in proposal development and production processes relating to developing responses to government and commercial Requests for Proposals (RFPs) and various types of procurement requests.

Education

Fredericka earned a Bachelor's degree from the University of Illinois at Chicago and a Master's degree in Education (M.Ed.) from DePaul University. Fredericka earned her Master in Public Affairs (MPA) and the Certificate in Local Government Management at the University of Texas at Dallas. Her capstone project involved Collin County in the State of Texas expenses on technology. The study and goal was to determine how the county compares to its peer groups regarding technology upgrades. Fredericka is a current member of the Honors society of Phi Kappa Phi Chapter 272.

References

City of Fort Worth, TX
1000 Throckmorton Street
Ft. Worth, TX 76102

Mr. Brian Dickerson
Director of Human Resources

(817) 392-7783
Brian.Dickerson@fortworthtexas.gov

- Researched, developed and recommended compensation structures for the City's general exempt and non-exempt job classifications utilizing market data provided by the City and proposed a job classification system to upgrade or replace the City's current job classification system for their general employee classifications
- Analyzed approximately 435 job titles covering approximately 3,745 employees
- Analyzed market data provided by the City for 134 benchmark jobs from approximately 35 benchmark organizations using market data collected and provided by the City
- Updated current pay schedules and design recommended salary schedules
- Recommend compensation structures for the City's exempt classifications
- Developed options and approaches for long-term sustainability; facilitated discussions on successful approaches for system maintenance, including policy changes to guide future compensation approaches based on best practices
- Prepared and delivered report; provided documentation on proposed changes and assist in the communication of these changes; defined the approach to be used in evaluating market changes; identified steps to recommend structure adjustments; provided options for movement through pay ranges; developed administrative guidelines for continued maintenance of the compensation system
- *Dates of Services: 2014 – Current Client*

City of Houston, TX
HR Financial and Accounting
Management
611 Walker, 4th Floor
Houston, TX 77002

Mr. Omar C. Reid
*Formerly City of Houston – Director
of Human Resources*

*Currently Harris Health System –
Senior Vice President of Human
Resources*

(713) 566-6255
Omar.reid@harrishealth.org

- Reviewed and redesigned job classification system and structure for 14,000 employees
 - Developed a total compensation labor market survey and database for 109 benchmark municipal jobs in 19 job families and Uniformed Police and Fire jobs
 - Reviewed and redesigned point-factor job evaluation system
 - Reclassified all civilian job titles
 - Supported negotiations with police and fire fighter employee associations
 - Worked with joint labor-management committee to develop revised prevailing wage rates applicable to unionized skilled trade occupations
 - Conducted an Environmental Scan to collect information from four (4) key major cities regarding practices for supporting their workforce through the HR function including organizational structure and internal processes
 - Currently provide benefits consulting services related to health plan evaluations, prescription drug, dental program, health benefit claims auditing, and total compensation statements
 - *Dates of Services: 1998 – Current Client*
-

City of Missouri City, TX

1522 Texas Parkway
Missouri City, TX 77489

Edward G. Williams, Ph.D.
Director, Department of Human
Resources & Organizational
Development

(281) 403-8500
EWilliam@missouricitytx.gov

- Conducted market survey for 85 benchmark job titles
- Adjusted the current pay schedule(s) to reflect market movement
- Identified grade assignment changes based on market differences
- Estimated the cost of implementing the recommended pay schedule
- Developed recommendations regarding placement of each employee within the pay ranges
- Developed and delivered presentation to senior management or elected officials
- *Dates of Services: 2006 – 2017*

Macomb County, MI

1 S Main, 6th Floor
Mount Clemens, MI 48043

Mr. Eric A. Herppich
*Former Director of Human
Resources and Labor Relations,
Macomb County*

*Current Director of Benefits and
Compensation, Oakland University*

414 Wilson Hall
Rochester, MI 48309

(248) 370-4166
eherppich@oakland.edu

- Conducted a joint labor/management classification and compensation study affecting approximately 2,700 employees covered by 750 job classifications within 24 employee groups
- Developed a customized Job Analysis Questionnaire to review the classification structure, providing information to meet FLSA, ADA, and other local, state, and federal requirements
- Developed a point factor system for use in evaluating changes in position responsibility for employees and to ensure internal equity
- Developed a customized salary and benefits market survey document with 100 benchmark job titles, distributed to ten (10) public sector peer employers and included published data
- Developed a pay schedule to cover all jobs covered by the study and recommended grade assignments for all job titles covered by the study
- Developed an implementation plan, including a financial analysis of costs, and guidelines for future administration
- Developed updated job descriptions for all positions
- Provided advice and consulted with the joint labor/management project team, as needed
- Ensured understanding of both labor and managements goals
- Worked with labor and management to identify mutual interests and need
- *Dates of Services: 2017*

Shelby County, TN

160 N. Main, 11th Floor
Memphis, TN 38103

Ms. Kim Denbow
Deputy Chief Administrative Officer

(901) 222-2050
kim.denbow@shelbycountyttn.gov

- Conducted a total compensation assessment of public employers
 - Determined the County's competitive market position
 - Designed a recommended salary schedule, including specific recommendations for Information Technology, Public Health Administration, and Public Safety
 - Recommended pay grade assignments for all positions included in the study
 - Determined cost of implementation
 - Assisted with implementation
 - *Dates of Services: 2016*
-

For additional information regarding our experience, please view the following reports, available online, for specific examples of how our organization's expertise and recommendations have benefited a public agency:

State of Alaska

<http://doa.alaska.gov/dop/fileadmin/directorsoffice/pdf/segalfinalreport.pdf>

State of Colorado

https://www.colorado.gov/pacific/sites/default/files/DPA%20Annual%20Compensation%20Survey%20Report%20FY2014-15_0.pdf

State of Rhode Island

<http://www.local2881.org/docs/Segal%20Report%20to%20State%20of%20RI%2001-26-13.pdf>

City of Cape Coral, FL

<http://www.google.com/url?sa=t&rct=j&q=&esrc=s&source=web&cd=8&ved=0ahUKEwjAn6qIxMXTAhUG0YMKHY9IC50QFghMMAc&url=http%3A%2F%2Fcapecoral.novusagenda.com%2FAgendaPublic%2FAttachmentViewer.ashx%3FAttachmentID%3D1107%26ItemID%3D1358&usg=AFQjCNFIZykdwd3tKF5LEx5ME7 AN-E2sA>

City of Phoenix, AZ

<https://www.phoenix.gov/itssite/Documents/070008.pdf>

City of San Diego Police Department, CA

http://www.sandiego.gov/mayor/pdf/sdpd_repositions11614.pdf

City of Sioux Falls, SD

<http://www.siouxfalls.org/human-resources>

Pinal County Sheriff's Office, AZ

http://sthcw.files.wordpress.com/2013/04/pinal_county_sheriffs_office_memo_as_of_4-22-131.pdf

Segal Waters Consulting Client List

Federal Government

Administrative Office of the U.S. Courts
U.S. Office of Personnel Management

States Governments and Agencies

Alabama
Alaska
Arizona
Colorado
Colorado Judicial Department
District of Columbia
Georgia Dept of Audits & Accounts
Georgia Merit System
Illinois Board of Education
Iowa
Maine Judiciary
Maryland Dept of Budget & Management
Maryland Dept of Mental Health
Maryland Judiciary
Massachusetts Treasurer & Receiver
Minnesota Judiciary
New Jersey Judiciary
North Carolina Education Lottery
Ohio Supreme Court
Oregon State Lottery
Rhode Island
Vermont Judiciary
Washington

Counties

Albemarle County (VA)
Anderson County (SC)
Anne Arundel County (MD)
Arlington County (VA)
Barry County (MI)
Bay County (MI)
Boulder County (CO)
City/County of Denver (CO)
Coconino County (AZ)
Deschutes County (OR)
Fairfax County (VA)
Forsyth County (GA)
[Harris County Appraisal District \(TX\)](#)
Isabella County (MI)
[Jackson County \(TX\)](#)
[Johnson County \(TX\)](#)
Kenosha County (WI)
Laramie County (WY)
Laramie County Library System (WY)

Las Vegas – Clark County Library
Lexington County (SC)
Los Alamos County (NM)
Macomb County (MI)
Minnehaha County (SD)
Mohave County (AZ)
Oakland County (MI)
Pierce County (WA)
Pinal County (AZ)
Prince George's County (MD)
Prince William County (VA)
Santa Barbara County (CA)
Shelby County (TN)
[Smith County \(TX\)](#)
Spotsylvania County (VA)
Stafford County (VA)
Waukesha County (WI)

Municipalities

City of Albuquerque (NM)
City of Asheville (NC)
City of Aurora (CO)
[City of Austin \(TX\)](#)
City of Avondale (AZ)
City of Baltimore (MD)
City of Boston (MA)
City of Bowie (MD)
City of Bristol (CT)
[City of Bryan \(TX\)](#)
City of Cape Coral (FL)
City of Carlsbad (CA)
[City of Carrollton \(TX\)](#)
City of Chandler (AZ)
[City of College Station \(TX\)](#)
City of Fort Lauderdale (FL)
[City of Fort Worth \(TX\)](#)
City of Gaithersburg (MD)
[City of Garland \(TX\)](#)
City of Glendale (AZ)
City of Goleta (CA)
City of Goodyear (AZ)
City of Grand Rapids (MI)
City of Greenville (NC)
City of Henderson (NV)
[City of Houston \(TX\)](#)
City of Knoxville (TN)
City of Lansing (MI)
City of Las Vegas (NV)
[City of League City \(TX\)](#)

City of Livermore (CA)
City of Manassas (VA)
City of Maricopa (AZ)
City of Middletown (CT)
City of New Bedford (MA)
City of North Kansas City (MO)
City of Olathe (KS)
City of Palo Alto (CA)
City of Phoenix (AZ)
City of Pittsburgh (PA)
City of Prescott (AZ)
City of Raleigh (NC)
City of Rehoboth Beach (DE)
City of Salem (VA)
[City of San Antonio \(TX\)](#)
City of San Diego (CA)
City of San Marcos (CA)
[City of San Marcos \(TX\)](#)
City of Santa Cruz (CA)
City of Seattle (WA)
City of Sedona (AZ)
City of Sierra Vista (AZ)
City of Sioux Falls (SD)
City of Solon (OH)
City of Surprise (AZ)
City of Wilmington (DE)
[City of Wylie \(TX\)](#)
Terrebonne Parish (LA)
Town of Acton (MA)
Town of Buckeye (AZ)
Town of Ocean City (MD)

Public School Districts

ABC Unified School District (CA)
Adams 12 Five Star School District (CO)
Arlington Public Schools (VA)
Boulder Valley School District (CO)
Denver Public Schools (CO)
East Baton Rouge Parish School System
Fairfax County Public Schools (VA)
Lafayette Parish School System (LA)
Loudoun County Public Schools (VA)
Norfolk Public Schools (VA)
Prince George's Co Public Schools (MD)
Prince William Co Public Schools (VA)
Spokane Public Schools (WA)
Springfield Public Schools (MA)
Stafford County Public Schools (VA)

Transportation Systems

Alaska Railroad Corporation
AC Transit (CA)
Ben Franklin Transit (WA)
[City of Austin - Transportation Dept. \(TX\)](#)
Central Ohio Transit Authority
C-TRAN (WA)
Columbus Regional Airport Auth. (OH)
[Denton County Transp. Authority \(TX\)](#)
Denver Regional Transit District (CO)
Des Moines Area Regional Transit (IA)
Fort Wayne-Allen County Airport Authority (IN)
Golden Gate Bridge and Highway Transportation District (CA)
[Harris County Transp. Authority \(TX\)](#)
Hillsborough Area Regional Transit (FL)
Indianapolis Public Transportation (IN)
Jacksonville Aviation Authority (FL)
Jacksonville Transp. Authority (FL)
Lehigh Northampton Airport Auth. (PA)
Lincoln Airport Authority (NE)
Maryland Transit Administration
Massachusetts Bay Transportation Authority
Massachusetts Dept of Transportation
Metro St. Louis (MO)
Metropolitan Atlanta Rapid Transit Authority (GA)
Metropolitan Nashville Airport Auth. (TN)
Milwaukee Transport Services (WI)
National Railway Labor Commission
New Jersey Turnpike Authority
Northern Arizona Intergovernmental Transp. Auth.
Orange County Transp. Authority (CA)
Pace, Suburban Bus Division of the RTA
Port Authority of Allegheny County (PA)
[Port of Houston Authority \(TX\)](#)
Raleigh-Durham Airport Authority (NC)
San Francisco Bay Area Rapid Transit
San Mateo County Transit (CA)
Southern California Regional Rail Auth. Transit Management of Southeast Louisiana, Inc.
Transit Management of Washoe County Valley Metro/RPTA (AZ)
Victor Valley Transit Authority (CA)
Virginia Railway Express (VA)
Washington DC Metropolitan Area Transit Authority

Utilities and Water Authorities

Birmingham Water Works Board (AL)
Castaic Lake Water Authority (CA)
Central Arizona Project (AZ)
[City of Austin - Austin Energy \(TX\)](#)
Coachella Valley Water District (CA)
Colorado Springs Utilities
Columbus Water Works (GA)
Denver Water (CO)
Des Moines Water Works (IA)
D.C. Water & Sewer Authority
Easton Utilities Commission (MD)
Fairfax Water (VA)
Great Lakes Water Authority (MI)
[Greenville Electric Utility System \(TX\)](#)
Greenville Utilities Commission (NC)
[Guadalupe-Blanco River Authority \(TX\)](#)
[Kerville Public Utilities Board \(TX\)](#)
Loudoun Water (VA)
Metropolitan District Commission (CT)
Navajo Tribal Utility Authority (AZ)
[New Braunfels Utilities \(TX\)](#)
Orange County Public Utilities (FL)
Platte River Power Authority (CO)
Prince William County Service Authority
Raleigh Public Utilities District (NC)
[Texas Municipal Power Authority](#)
Toho Water Authority (FL)
[Trophy Club Municipal Utility District \(TX\)](#)
Upper Occoquan Service Authority (VA)
Water Replenishment District of Southern California

Other Public Authorities

[Bexar County Center for Health Care Services \(TX\)](#)
[Bexar County Juvenile Probation Department \(TX\)](#)
CareerSource Palm Beach County (FL)
Cuyahoga Library District (OH)
[Employees Retirement System of Texas](#)
Illinois Teachers Retirement System
North Carolina Education Lottery
Northern California UFCW
Northern Virginia Regional Park Authority
Ohio Public Employees Retirement System
Orleans Parish Sheriff's Office (LA)
Spokane Regional Health District (WA)

Public Sector Higher Education

Butler County Community College (KS)
Central Piedmont Community College (NC)
Central New Mexico Community College
[College of the Mainland \(TX\)](#)
[Collin County Community College \(TX\)](#)
Colorado Community College System
Community College of Philadelphia (PA)
Delaware County Community College (PA)
George Mason University (VA)
Grand Rapids Community College (MI)
James Madison University (VA)
Maricopa County Community College (AZ)
Milwaukee Area Technical College (WI)
Morehead State University (KY)
Montgomery College (MD)
Mott Community College (MI)
Northern Virginia Community College
Northern Wyoming Community College
Palomar College (CA)
Parkland College (IL)
Portland Community College (OR)
Radford University (VA)
[Texas A&M University Libraries](#)
Thomas Edison State College (NJ)
University of Connecticut
University of the District of Columbia
Virginia Community College System
Virginia Tech (VA)
Yavapai Community College (AZ)

e) Technical Proposal

Step 1: Project Initiation and Classification Study

Initial Meeting

The first task of this project will be to meet with the County Committee to discuss the study and agree on the methodology and process to be used. We will also:

- Discuss the County's current compensation and classification structures, as well as the reasons for this project
- Finalize the timeline and specific dates for deliverables
- Clarify Segal Waters' and the County's roles in each project phase
- Establish parameters and protocols for keeping the County Committee updated and informed
- Identify data or information needed to support the overall assignment

This meeting will help identify a clear project strategy that will facilitate a smooth and effective working relationship resulting in a successful outcome for the County.

Our Expectations of the County for this Step

For the initial meeting and stakeholder interviews, we ask the County to coordinate the schedules of those who will participate, as well as provide a meeting room. In addition, we ask that the County provide the following information in electronic format:

- Salary structures
- Policies and Procedures Handbook
- Budget information related to staffing
- Existing classification and compensation documents
- Current organization charts
- Up-to-date job descriptions in Microsoft Word
- Current and accurate employee census data

Classification Study

We understand the County is requesting recommendations for changes to approximately thirty (30) job titles, which will require the consultant to:

- Conduct on-site briefing sessions for all employees covered within the scope of the study to explain the methodology of the project and the Job Analysis Questionnaire (if needed).
- Review all current classification specifications and analyze, document and validate same for distinguishing characteristics, position definition and purpose, knowledge, skills, abilities, essential job functions, minimum qualifications, education and experience relevance, hierarchal consistency, essential personnel status, safety sensitive status, conformity with the Americans with Disabilities Act (ADA) language relative to essential job functions (including physical and mental requirements), working/environmental conditions,

supervision received and exercised, standby/call back responsibilities, and special requirements including licensing, regulatory and certification requirements.

- Develop a job analysis/position description questionnaire to be used as part of the position review process, which must include an FLSA exempt test.
- Seek approval of the County Committee for the final design of the questionnaire prior to distribution.
- Oversee the completion of the job analysis/position description questionnaire by all employees covered within the scope of the study.
- Review and analyze the completed questionnaires and management review for all employees covered within the scope of the Study.
- Conduct follow-up telephone interviews (desk audits), if needed, with a representative sample of covered employees, as well as appropriate supervisor and management staff, to verify/clarify information received in the questionnaires and to ensure information regarding organizational structure, supervision, essential job duties and working environment is accurately captured and reflected in the current descriptions.
- Consult with the Human Resources Director to verify/clarify information gained from interviews with department directors/supervisors.
- Recommend and develop new classifications as appropriate.
- Review the EEO Job Classification categories; management, supervisory, professional, technical, labor and general employees, including the FLSA Exemption Test (exempt/non-exempt) and make recommendation on changes.
- Recommend job specification changes where necessary, and ensure that desirable experience and education qualifications are appropriate.
- Present proposed class specification changes to Human Resources Director for review with the Department.
- Receive and incorporate input prior to final classification determination.

To accomplish these goals we propose the following steps:

40. Develop a Job Analysis Questionnaire
41. Distribute the Job Analysis Questionnaire
42. Analyze the Jobs
43. Conduct Employee Telephone Interviews as needed
44. Recommend Changes to Individual Job Classifications
45. Conduct FLSA Analysis
46. Update Job Descriptions as Needed

Each of these steps is described in detail on the following pages.

1. Develop Job Analysis Questionnaire

During this task, we will develop a customized questionnaire reflecting the needs of the County and the direction of the County Committee to be used as part of the position review process. The information elicited from employees and supervisors in the Job Analysis Questionnaire (JAQ) will provide the basis for job series distinctions, internal equity determinations, job descriptions, and FLSA determinations.

While we customize our Job Analysis Questionnaires to specific client projects, we anticipate that the JAQ will include questions concerning:

- Distinguishing characteristics, position definition and purpose
- Knowledge, skills and abilities (KSAs)
- Essential job functions and minimum qualifications
- Education and experience
- Hierarchical consistency
- Essential personnel status and safety sensitive status
- Conformity with the Americans with Disabilities Act (ADA) language relative to essential job functions (including physical and mental requirements)
- Working/environmental conditions
- Supervision received and exercised
- Standby/call back responsibilities
- Special requirements including licensing, regulatory and certification requirements

We will use the information collected through the Job Analysis Questionnaires and employee interviews to develop recommended changes to job classifications and job descriptions. It is important that the County Committee carefully review and approve the questions and content of the draft JAQ to determine whether it meets your expectations for these outcomes.

2. Distribute the Job Analysis Questionnaire

Once the JAQ content is finalized and approved by the County committee for distribution, the County will distribute the Job Analysis Questionnaire to the appropriate employees for completion.

Following the employees' completion of the questionnaire, supervisors and department directors will have the opportunity to review and comment on each completed questionnaire; the Human Resources Director will also review the completed questionnaires.

3. Analyze the Jobs

Once the JAQs have been submitted to Segal Waters by the County, we will analyze the County's jobs. We will review each JAQ within a job title and series, as well as review the comments made by supervisors, department directors, and the Human Resources Director, and document distinguishing characteristics that define a particular job title within the job family.

4. Conduct Employee Telephone Interviews

After we have received and analyzed the completed JAQs, we determine if there is a need to conduct employee follow-up interviews to clarify information collected in the JAQ. The purpose of these interviews is to:

- Verify/clarify information received in the questionnaires
- Ensure information regarding organizational structure, supervision, essential job duties and working environment is accurately captured and reflected in the current descriptions

We will consult appropriate supervisory and management staff to verify/clarify information from the JAQs, and may consult the Human Resources Director to verify/clarify information obtained from interviews with department directors and supervisors.

5. Recommend Updates to Individual Job Classifications

As the job analysis progresses, we will develop and document a recommended changes to job classifications.

We anticipate recommending some of the following actions:

- Consolidation of class titles that have highly similar responsibilities and requirements, or deletion of outdated or unnecessary classes.
- Development of new class titles for positions that reflect new or different roles, responsibilities, or requirements.
- Re-wording of class titles, based on standard occupational nomenclature or for clarity.

6. Conduct FLSA Analysis

As you know, the Fair Labor Standards Act requires that employers provide overtime pay at time and one-half the regular rate of pay for all hours worked over 40 hours in a workweek.

However, Section 13(a)(1) of the FLSA provides an exemption from overtime pay for employees employed as bona fide executive, administrative, professional, and outside sales employees. The U.S. Department of Labor (DOL) Wage & Hour Division (WHD) is responsible for enforcing the FLSA and provides guidance to employers through fact sheets, opinion letters, administrator interpretations, and other documents.

The DOL guidance regarding overtime exemption includes information on the following exemption tests:

- Executive Exemption
- Administrative Exemption
- Learned Professional Exemption
- Creative Professional Exemption
- Computer Employee Exemption
- Outside Sales Exemption
- Highly Compensated Exemption

The Job Analysis Questionnaire (JAQ) will contain targeted questions to gather detailed information on job duties that the Department of Labor has identified as key determinants of exemption status for white collar jobs, such as:

- Whether an employee “customarily and regularly exercises discretion and independent judgment.”
- Whether an employee is responsible for direct supervision of others (or whose recommendations are given “particular weight” when making personnel decisions).
- Whether the job’s primary duty meets any of the DOL’s exemption tests.

Using this information, we will apply the Department of Labor’s (DOL) “duties” tests and provide guidance to the County regarding:

47. Whether jobs should be classified as Exempt or Non-Exempt
48. If a job is Exempt, which test is applicable (Executive, Administrative, Learned Professional, Creative Professional, or Computer Professional)

Our final report will contain information on:

- Each job’s current exemption status
- Our recommended exemption status
- The applicable test(s) for those positions we think are exempt from the overtime regulations
- The rationale for our recommendations

It is important to understand, however, that our recommendations regarding FLSA exemptions do not constitute a legal opinion. Our firm does not provide legal advice to our clients. You may wish to have our recommendations reviewed by independent legal counsel.

7. Update Job Descriptions

We understand that the County would like the consultant to recommend job specification changes where necessary, and ensure that desirable experience and education qualifications are appropriate and defensible while serving to select qualified candidates. To support your need, we will work to determine whether you wish to maintain or modify the current format. In general, we suggest that an organization should have a consistent format for all class specifications, with an easy to read and easy to update layout, such as the following:

Sample Job Description

<input type="checkbox"/> Classification Title	<input type="checkbox"/> Accountant
<input type="checkbox"/> Job Code	<input type="checkbox"/>
<input type="checkbox"/> FLSA Status	<input type="checkbox"/> Exempt
<input type="checkbox"/> Pay Grade	<input type="checkbox"/>

GENERAL SUMMARY

Maintains payroll related accounts, including reconciliations and balancing. Prepares payroll reports, processes payroll interfaces and books payroll related accounting entries to general ledger. Etc...

ESSENTIAL DUTIES & RESPONSIBILITIES

The intent of this job description is to provide a representative summary of the major duties and responsibilities performed by incumbents of this job. Employees may be requested to perform job-related tasks other than those specifically presented in this description.

- Performs payroll processing, including creating pay run IDs, performing payroll calculation validations, sending out payroll variance report and processing interfaces between systems.

MINIMUM ENTRANCE QUALIFICATIONS

Education and Experience

- A Bachelor's Degree from an accredited college or university in Accounting, Finance, Business Administration or a related field
- At least two years of increasingly responsible accounting experience.
- Any equivalent combination of training, education, and experience that provides the required skills, knowledge and abilities

Licenses or Certifications

- Possession of (or ability to obtain within 1 month of hire) a standard driver license

OTHER JOB REQUIREMENTS

- None.

PREFERRED QUALIFICATIONS

- None.

COMPETENCIES FOR SUCCESSFUL PERFORMANCE OF JOB DUTIES

Knowledge of:

- Basic accounting and auditing principles and practices.

- Principles and practices of financial record keeping and reporting.



Skill in:

- Providing customer service.
- Accuracy and attention to detail.

Ability to:

- Communicate clearly and effectively, both orally and in writing.
- Calculate taxes and other pretax deductions.
- Etc...



WORK ENVIRONMENT/CONDITIONS

The work environment and exposures described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

<input type="checkbox"/> Work Environment	<input type="checkbox"/> Seldom or Never	<input type="checkbox"/> Sometimes or Occasionally	<input type="checkbox"/> Frequently or Often
Office or similar indoor environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> x
Etc.	x	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Exposures	<input type="checkbox"/> Seldom or Never	<input type="checkbox"/> Sometimes or Occasionally	<input type="checkbox"/> Frequently or Often
Individuals who are rude or irate	x	<input type="checkbox"/>	<input type="checkbox"/>
Etc.	x	<input type="checkbox"/>	<input type="checkbox"/>

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The position is generally sedentary. Employees sit most of the time, but may walk or stand for brief periods of time.

<input type="checkbox"/> Date created:	<input type="checkbox"/> 02/18/16
<input type="checkbox"/> Dates revised:	<input type="checkbox"/>

Once you have approved the basic format, we will then update the current job descriptions for all job titles using the information in the Job Analysis Questionnaire and employee interviews. Naturally, we will develop new specifications for any new classes that have been added to the structure because of the classification analysis.

We will deliver draft job descriptions in Microsoft Word format so that the County can review and provide final edits. In order to maintain a competitive price for the project, we have assumed that we will deliver draft documents and that the County’s human resources staff will distribute the draft documents to department managers for their review and then human resources staff will make any edits or changes to the drafts based on this feedback.

Our Expectations of the County for this Step

Task/Step	County Committee Role
1. Develop JAQ	<ul style="list-style-type: none"> • Review drafts and approve final JAQ • Identify job titles for review and distribute JAQs to appropriate employees • Collect JAQs after reviews from departments • Send JAQs to Segal Waters
2. Distribute the Job Analysis Questionnaire	<ul style="list-style-type: none"> • Distribute the JAQ to select employees • Be available for questions and clarification
3. Analyze the Jobs	<ul style="list-style-type: none"> • Provide employee census data and information on the current job title structure in electronic format • Be available for questions and clarification
4. Conduct Telephone Employee Interviews	<ul style="list-style-type: none"> • Assist with selecting employees to participate • Facilitate scheduling and arrangements
5. Recommend Updates to Individual Job Classifications	<ul style="list-style-type: none"> • Be available for questions and clarifications • Approve assignments
6. Conduct FLSA Analysis	<ul style="list-style-type: none"> • Provide information on current FLSA status
7. Update Job Descriptions	<ul style="list-style-type: none"> • Provide current job descriptions in Microsoft Word • Review and edit draft job descriptions, as applicable

Step 2: Wage/Compensation Study

We understand the County is requesting a wage/compensation market study, which will require the consultant to:

- Review current compensation practices and related issues.
- Work with the Committee to formulate a formal compensation philosophy, and identify and recommend appropriate salary survey data labor market and benchmark classes that provide relevant/meaningful comparative salary data, which can be utilized in creating a competitive pay plan.
- Ensure the benchmark classifications are a good representation of an occupational group or profession.
- Conduct market salary survey of public sector organizations comparable to the County in size, population, economic climate, proximity to major cities, etc.
- Seek the Committee's input as to what other public sector organizations will be used in the Study.
- Compare base annual salary for each County position included in the Study by minimum, midpoint and maximum.

To conduct a valid, reliable, and useful market study, we propose to take the following steps:

49. Develop a compensation philosophy and market study methodology
50. Identify benchmark job titles
51. Identify comparable employers and other data sources
52. Collect and analyze the market data
53. Prepare and deliver a report to you detailing our findings

These steps are described in more detail below and on the following pages.

1. Develop a Study Methodology

We think that it is important for Segal Waters and the County Committee to gain consensus on overall goals and strategy regarding compensation, including the market study. We will work with the County Committee to clarify and finalize the market study methodology.

Our goal is to have a common understanding of the various options for conducting the market study, as well as an understanding of the implications on subsequent design of new salary structures and pay policies. This understanding will allow us to develop and conduct a market study that is consistent with the County's compensation goals and will support the County's expectations.

For this project, we recommend conducting a custom-designed survey targeted to your public sector peer employers. We recommend this for the following reasons:

- Custom surveys provide the most currently available data
- Custom surveys allow you to target specific geographic markets, employers, and specific jobs
- Custom surveys allow you to collect information that is not usually available in published data sources, such as scheduled salary ranges, pay supplements, compensation policies, union status, benefits, etc.

2. Identify Benchmark Job Titles

We understand that this project covers approximately 475 job classification titles. Since it is not practical to collect market data on all job titles, we will develop a recommended list of benchmark jobs to include in the market study that captures a broad array of occupational groups, departments, and pay levels throughout the County.

We anticipate that up to 100 job titles will be identified as benchmarks for the market study.

3. Identify Comparable Employers to Survey

The next step will be to determine the comparable employers to include in the study. Typically, these employers include public sector entities that are geographically and economically similar/proximate to the County and are likely to have matching jobs. In addition, it might also include public sector employers outside of the immediate commuting area, but that are similar to the County in terms of size, scope, population, or other characteristics. Naturally, we will seek the Committee's input as to what other public sector organizations will be used in the study.

For pricing purposes, we have assumed the custom market study will be distributed to up to 12 public sector entities.

4. Collect and Analyze the Market Data

We will also design a survey instrument for collecting the market information, which we typically develop in MS Excel. The types of information we anticipate collecting through the survey include:

- Benchmark job base pay ranges (minimum and maximum annual pay rates)
- Actual average pay rates
- Policies regarding pay progression (that is, how employees move through a pay range)
- Policies regarding adjustments to the pay schedule
- Supplemental pay practices (such as additions for special skills, bilingual pay, performance bonuses, etc.)
- Other relevant pay policies (such as hiring salary practices)

We will also draft brief job summaries for each benchmark title based on the results of the classification analysis to assist the survey participants with matching jobs consistently and appropriately.

Once the County Committee has reviewed and approved the survey document, we will distribute it to the approved group of comparable employers. We make many efforts to achieve the goal of 100% participation from each invited employer, yet we cannot guarantee that we will obtain good data from each of the employers invited to participate and for all of the jobs requested.

Respondents will return completed surveys and supplementary materials directly to Segal Waters. We will review and validate each survey response for completeness and reasonability, and then follow up with survey participants as necessary to clarify any incomplete or inconsistent responses.

Segal Waters will design a database to support our analysis that will become the property of the County upon completion of this project for your future analyses.

We will then analyze the survey data to determine the County’s market position relative to the market average minimum, midpoint, and maximum pay rate for each benchmark job title. We then compare these averages to the County’s pay ranges to determine the market position for each job title and occupational group. Based on industry standards that align with federal antitrust/safe harbor guidelines, benchmarks that receive less than five (5) total responses will not be included in our final report.

To the extent that different employer groups or industry sectors are included in the study, we will segment our findings accordingly. In addition, if applicable, we will geographically adjust market data for respondents outside of the metro area, using current cost of labor differentials from ERI Geographic Assessor.

Our report will include summary tables, such as the tables shown below.

EXAMPLE TABLE 1
WEBB COUNTY’S MARKET POSITION BY SECTOR—PAY ONLY

	Client Pay Ranges as a Percent of the Market Average		
Market Sector	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Public Sector	106%	101%	97%

EXAMPLE TABLE 2
WEBB COUNTY’S MARKET POSITION BY DATA SOURCE—PAY ONLY

Public Sector Peer Employer	# of Job Matches	Client as a Percent of the Average		
		Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Public Sector Peer #1	46	97%	98%	99%
Public Sector Peer #2	55	100%	99%	99%
Public Sector Peer #3	57	102%	99%	97%
Public Sector Peer #4	58	116%	108%	102%
Public Sector Peer #5	59	97%	98%	98%
Public Sector Peer #6	48	124%	104%	93%
Public Sector Peer #7	56	101%	95%	90%
Public Sector Peer #8	30	113%	107%	103%
Public Sector Peer #9	54	90%	89%	88%
Public Sector Peer #10	46	121%	116%	112%
Overall		100%	95%	90%

Figures shown in **red** are below market (less than 95% of the market average)
 Figures shown in **black** within the market range (95% to 105% of the market average)
 Figures shown in **blue** are above market (more than 105% of the market average)

EXAMPLE TABLE 3
WEBB COUNTY'S OVERALL MARKET POSITION—PAY ONLY

Job Family and Benchmark Title	# of Matches	Client as a % of the Overall Market Average		
		Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Building Maintenance				
Custodian	12	92%	88%	85%
Electrician (Journey)	12	113%	103%	96%
Groundskeeper	13	113%	110%	107%
HVAC Supervisor	12	102%	97%	93%
Locksmith	16	104%	99%	95%
Courts				
Bailiff	13	94%	91%	88%
Counseling Services Coordinator	9	114%	110%	106%
Warrant Officer	13	116%	109%	102%
Fire				
Assistant Fire Chief	7	115%	103%	94%
Firefighter/Driver	8	107%	98%	91%
Information Technology				
Application Support Analyst	11	102%	100%	98%
Multimedia Support Technician	12	96%	91%	87%
Systems Administrator	13	95%	88%	82%
Juvenile Department				
Director of Intake Services	12	100%	93%	87%
Health Services Coordinator	9	112%	104%	98%
Lead Cook	14	101%	103%	103%
Legal Assistant	9	101%	101%	101%
Victim Services Coordinator	11	102%	102%	101%
Medical Examiner				
Administrative Assistant	9	112%	103%	97%
Chief Medical Examiner	10	113%	108%	102%
Medical Death Investigator	5	103%	93%	79%
Planning Department				
GIS Administrator	13	95%	94%	92%
Principal Planner	13	91%	87%	82%
Sanitarian	8	106%	104%	102%

		Client as a % of the Overall Market Average		
Benchmark Title	# of Matches	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Public Defender's Office				
2 nd Assistant Public Defender	7	96%	86%	79%
Chief Criminal Investigator	14	99%	100%	100%
Operations Officer	6	116%	109%	105%
Purchasing				
Assistant Purchasing Agent	14	90%	95%	98%
Billing Analyst	12	90%	97%	100%
Buyer	13	89%	93%	96%
Fixed Asset Coordinator	12	101%	100%	98%
Records Management				
Employee Benefits Administrator	11	101%	99%	97%
Safety Coordinator	11	105%	99%	95%
Workers Compensation Analyst	9	90%	80%	74%
Road and Bridge				
Concrete Form Setter	15	99%	86%	79%
Paving Crew Leader	13	99%	92%	87%
Vacuum Truck Driver	14	86%	81%	77%
Welder	13	100%	96%	91%
Tax Assessor - Collector				
Chief Deputy Tax Assessor - Collector	9	99%	97%	95%
Collections Specialist	5	81%	73%	67%
Motor Vehicle Investigator	7	123%	116%	111%
Special Tax Clerk	9	141%	132%	126%
Water/Utilities				
Heavy Equipment Operator	13	85%	88%	91%
Water Plant Supervisor	11	94%	89%	85%

In addition, our report will include detailed data showing each comparator's job match, salary range, and other information for each benchmark title, as shown below.

EXAMPLE TABLE 4

APPENDIX B – DETAILED MARKET DATA (ADJUSTED)

Accountant II Finance					
Respondent	Matching Job Title	Workweek	Pay Range Minimum	Pay Range Midpoint	Pay Range Maximum
Peer 1	No Match		NA	NA	NA
Peer 2	Senior Accountant	40.00	\$58,475	\$76,018	\$93,560
Peer 3	Accounting Specialist	40.00	\$45,407	\$54,873	\$64,339
Peer 4	Accounting Officer	40.15	\$46,422	\$59,235	\$72,047
Peer 5	Assistant for Finance	40.00	\$52,221	\$63,004	\$73,787
Peer 6	Accountant II	40.00	\$45,830	\$56,993	\$68,157
Peer 7	Accountant	40.00	\$50,344	\$65,880	\$81,417
Peer 8	Accountant II	40.00	\$49,404	\$60,858	\$72,312
Peer 9	Accountant 2	40.00	\$41,728	\$54,235	\$66,741
Peer 10	Senior Financial Services Analyst	40.00	\$40,373	\$47,236	\$54,100
Webb County		40.00	\$60,684	\$71,034	\$81,384
Overall Comparator Market Average			\$47,800	\$59,815	\$71,829
County as a % of Overall Market Average			127%	119%	113%
Adjustment To Reach Market Average			-21%	-16%	-12%

- NA = Data Not Available
- All data is adjusted based on geographic differences in the cost of labor, and/or differences in workweek definition, as applicable.

Benchmark Job Summary

- Prepares, reviews, and/or approves accounting transactions in accordance with Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB) pronouncements, organization Fiscal Rules, statutory requirements, and other authoritative guidance. Such transactions may include, but are not limited to, disbursement of funds, receipt and deposit of funds, journal entries, and intra-governmental transfers. Performs routine to moderately complex calculations, reconciliations, ledger maintenance, and account monitoring. Prepares routine to moderately complex financial reports. Reviews financial transactions for accuracy and completeness and implements necessary corrective action. Assists in training staff on fiscal rules, state accounting systems, accounting procedures, and statutes. Provides phone, email, and in-person customer service to department personnel, vendors, and customers.
- Minimum Qualifications: Graduation from an accredited college or university with a bachelor's degree in accounting or closely related field, such as finance, and two years of professional accounting experience.

5. Prepare a Report of Our Findings

Once all data have been collected, reviewed, and analyzed, we will prepare a report detailing our methodology and findings. The report will include at least the following items:

- An Executive Summary, briefly describing our key findings
- A description of the study objectives and methodology
- The County’s competitive market position for pay, applicable to each benchmark job title and job family
- The prevailing policies regarding pay progression, supplemental pay, and other compensation-related practices collected in the survey
- Appendices showing detailed information collected for the market study

Expectations of the County for this Step

Task/Step	County Committee Role
1. Develop compensation strategy and market study methodology	<ul style="list-style-type: none"> • Meet with Segal Waters staff, provide direction on strategy and methodology
2. Identify benchmark jobs	<ul style="list-style-type: none"> • Review and approve list of benchmarks
3. Identify comparable employers	<ul style="list-style-type: none"> • Review and approve list of comparators
4. Collect and analyze the market data	<ul style="list-style-type: none"> • Review and approve survey document • Assist contacting survey recipients, if necessary • Complete survey on behalf of the County • Review draft market data and provide comments
5. Prepare and deliver report	<ul style="list-style-type: none"> • Review draft report, provide feedback, and approve final report

Step 3: Recommendations Development

We understand the County is requesting the consultant:

- Recommend updates to the County's current compensation plan design and salary schedule, utilizing the market survey results and other data collected.
- Recommend changes/additions to the current County policies regarding salary changes (promotions, reclassifications, demotions, etc).
- Conduct a pay compression analysis.
- Identify any potential pay compression issues and provide alternative (possibly multi-year implementation) solutions.
- Prepare an analysis of the financial impact of the new classification and compensation plan, and perhaps make recommendations on multi-year implementation.
- Develop and prepare other appropriate written training materials, including but not limited to pay scales.
- Provide implementation support and additional training as needed to ensure maintenance of the classification and compensation structure.

Based on the findings of the market study and with the guidance of the County Committee, we will then develop revised salary schedules for the County. For this step in the project, we propose the following steps:

54. Recommend Updates to the Current Salary Schedule
55. Recommend any Changes in Placement of Job on the Salary Schedule as needed
56. Analyze Pay Compression
57. Determine Cost Impact
58. Assist with Implementation

1. Recommend Updates to the County's Current Salary Schedule

Once the market study report has been finalized, we will make any recommended changes to your current salary schedule, utilizing the market survey results and other data collected.

We will work with the County Committee to determine the most appropriate changes for your organization.

2. Recommend Pay Grade Assignments

We will then recommend any grade assignment changes for all jobs covered by the study. First, we will recommend grade assignments revisions for benchmark jobs based on the market study findings. Typically, our goal is to identify the grade that is within 10 to 15% of the market average at the midpoint.

Next, we will recommend any grade assignment revisions for non-benchmark jobs using the internal relationships to benchmark jobs.

Last, we will review any changes to grade assignments with the County Committee, highlighting situations that represent significant change from the current pay relationships. Once you have had an opportunity to review and internally vet the recommendations, we will finalize the grade assignments as part of our final recommendations.

Our goal will be to ensure the new system 1) is market based, 2) considers the comparable worth based on job duties and competencies, and 3) is easily understood and used by managers and employees.

3. Analyze Pay Compression

Part of our study includes identifying any potential pay compression issues and provide alternative (possibly multi-year implementation) solutions. Pay compression can take several forms. The most typical ones are:

Pay rates for employees in the same are too close together regardless of the individuals' credentials (prior experience, time in the job, skills, etc.). This situation can occur when pay ranges are not market competitive and/or employees have not received pay increases over time. As a result, when new employees are hired into the organization, they are offered a salary that is close to (or above) the salaries paid to existing employees.

Pay rates among employees in different levels within a job series or career path are too close together. For example, salaries for Senior Buyers are close to the salaries for Buyers, although the responsibilities and requirements for the senior level job are higher than the more junior position.

Pay rates of supervisors are very close to (or lower than) the salaries of employees who report to them. This situation can occur for several reasons: when the supervisory pay range has significant overlap with the pay ranges of their direct reports, when policies or fiscal conditions restrict promotional pay increases, when first-line supervisors are not eligible for overtime pay but their direct reports regularly earn overtime pay, and other similar reasons.

To begin this step in the project we will first discuss with you the types of pay compression that the County has been experiencing.

We will then conduct an analysis of current pay data along with as much information you can provide regarding each individual employee. Ideally, we would examine characteristics of employees that can drive pay rates, such as type and length of prior experience, education levels and other credentials, performance history, time in the position, time with the County, overtime earnings, any personnel actions throughout someone's time with the County (such as pay increases and title changes), and other similar items.

Our analysis will explore potential causes of the problems and provide potential solutions. In some cases, pay compression can be solved through other aspects of this study. For example,

improving market competitiveness of the pay ranges and implementation of a new classification structure with appropriate job levels can often correct many pay compression situations.

□ If additional measures are needed, we can recommend criteria for setting salary levels designed to correct any current misalignments and reduce the chances of creating new problems in the future. For example, we can recommend guidelines for employee placement within the range based on individual characteristics. These types of criteria, coupled with policy standards for determining salary offers for new employees, can create a process for identifying and preventing any new pay compression situations in the future.

□ Our goal in the analysis will be to:

1. Define and quantify the extent of the problem
2. Present and communicate the issues in a way that is understandable to decision makers
3. Provide solutions to the immediate problems, along with cost estimates associated with the solutions
4. Offer suggestions for policies, guidelines, and procedures to reduce the chance of pay compression occurring in the future

□ We will prepare a draft report for your review and – after discussion with you – we will then deliver a final report incorporating your feedback and comments. Our price also assumes that we will attend a meeting with decision makers or influencers (such as members of the County Committee) to explain the situation and discuss remedies.

4. Develop Recommended Pay Policies

We will also work with you to develop compensation policies that are appropriate for the County and consistent with market practices. These may include the following:

- **Pay schedule adjustment policies:** how and when adjustments are made to the pay schedule, and whether/how these adjustments affect employees' individual pay
- **Hiring and Reclassification practices and policies:** to what extent new employees can be hired above the minimum of the pay range, criteria for setting hiring salaries, procedures for reclassifying jobs
- **Pay supplements and additions to base pay:** such as pay for special skills or competencies, shift differentials, on-call or call-back pay, etc.
- **Special pay circumstances:** options for employees whose pay rates may fall outside the range of the new pay scale established

We will review the County's current compensation policies and—after discussion with the County Committee regarding the advantages, disadvantages, and implications of each—will draft revised policy language that reflects our recommendations for changes. We will deliver our recommendations to you in Microsoft Word so that you can make any edits or changes based on your needs.

5. Determine Cost Impact

We will estimate the annualized cost of implementing the new/revised classification structure and pay scales.

This will require determining rules for placing current employees within the new pay ranges. While the prior steps determined the grade assignment for each position, this step involves determining each employee's salary within the assigned grade of the revised pay structure on the day of implementation.

We will work with you to determine the placement criteria. These criteria could include factors such as:

- Time the employee has been in the position
- Time the employee has worked for the County
- Current position in the salary range
- Desired market position for individual salaries
- Internal equity and pay compression considerations
- Results of recent performance appraisals

Based on the guidance of the County Committee regarding these criteria, we will identify each employee's recommended salary within the applicable pay range and will then determine the first year annual cost of implementing the new classification structure and pay schedule.

Since we understand that successful implementation may depend heavily on the cost of implementation, our recommendations include two costing models for the County's consideration. Depending on the needs of the County, each model may reflect the following variables:

- Changes to the classification structure and its impact on individual employees
- Other factors that may impact placement of employees into the new pay structure such as:
 - Pay compression
 - Changes in the design of the pay structure(s) (e.g. number of grades, range width of each grade as well as minimum and maximum values)
 - Timing of implementation

Each model will be constructed to provide the County with the ability to conduct sensitivity analysis (changes to the variables) independent of Segal Waters.

Our Expectations of the County for this Step

Task/Step	County Committee Role
1. Update the Current Salary Schedule	<ul style="list-style-type: none"> • Discuss objectives/goals with Segal Waters team, provide direction and input • Review and approve recommended changes
2. Recommend Pay Grade Reassignments	<ul style="list-style-type: none"> • Provide information on current pay grade assignments • Be available for questions and discussion • Review and approve methodology and pay grade assignments
3. Analyze Pay Compression	<ul style="list-style-type: none"> • Provide information on current pay policies • Discuss potential options for policies with Segal Waters team • Review and approve pay policy language
4. Develop Recommended Pay Policies	<ul style="list-style-type: none"> • Provide information on current pay policies • Discuss potential options for policies with Segal Waters team • Review and approve pay policy language
5. Determine Cost Impact	<ul style="list-style-type: none"> • Provide employee census information • Provide information on fiscal ability and conditions • Discuss and approve implementation criteria • Review and approve cost model

Step 4: Present Final Results to the County

We will prepare a written and electronic final report of recommendations, including a discussion of methods, techniques, and data used to develop the classification and wage plan and present same to the Committee and Webb County Commissioners Court. While it is difficult to anticipate at this time the exact nature of this presentation, our price proposal assumes we will develop and deliver one on-site presentation that will contain at least the following elements:

- Background and reasons for the project
- Objectives and goals of the project
- Methodology used to conduct our analysis
- Key findings and outcomes
- Our recommendations, including potential implications of those recommendations

We will draft the presentation for the County Committee’s review, and then will finalize the document based on your comments and input. We anticipate that a senior member of Segal Waters’ Team will deliver the presentation, in conjunction with a senior member of the County Committee.

Project Timeline

Segal Waters is available to begin this project upon award of contract. Our proposed timeline below and specific project deliverables will be finalized with the County Committee during Step 1: Project Initiation.

ANTICIPATED TIMELINE IN MONTHS

Step	1	2	3	4
Step 1: Project Initiation and Classification Study	■	■	■	
Step 2: Wage/Compensation Study		■	■	■
Step 3: Recommendations Development				■
Step 4: Present Final Results				■

f) Attachments

Since 2012, Segal Waters Consulting has worked with the following organizations in Texas:

Austin Employees' Retirement System	City of Round Rock
Austin Energy	City of San Antonio
Bandera Appraisal District	City of San Marcos
Brazos River Authority	City of Sugar Land
City of Addison	City of Victoria
City of Beeville	City of Wylie
City of Bryan	College of the Mainland
City of Cedar Hill	Collin County Community College District
City of Cedar Park	Comal County
City of Cibolo	Denton County Transportation Authority
City of College Station	El Paso City Employees' Pension Fund
City of Conroe	Employees Retirement System of Texas
City of Edinburg	Floresville Electric
City of Fort Worth	Guadalupe-Blanco River Authority
City of Garland	Harris County Appraisal District
City of Granbury	Jackson County
City of Groves	Johnson County
City of Gun Barrel City	Karnes Electric
City of Highland Park	Kerrville Public Utility Board
City of Hondo	Montgomery County
City of Houston	New Braunfels Utilities
City of League City	Port of Houston Authority
City of Leon Valley	San Miguel Electric Cooperative
City of Lufkin	Smith County
City of Mesquite	Texas A&M University - Libraries
City of Missouri City	Tarrant County 911
City of Mont Belvieu	Texas Municipal Power Agency
City of New Braunfels	TEXPERS
City of Pecos City	

g) Fee Proposal

Segal Waters is fully aware of the sensitivity of budget allocations for public sector employers. We believe that you will find our approach focused toward achieving the County’s objectives in the most cost-effective manner consistent with quality, accuracy, and timeliness.

Project Step	Fixed Fee
Step 1: Project Initiation and Classification Study Assumes the following: <ul style="list-style-type: none"> • Assumes one-day on-site for project planning and time associated with learning about the County’s current compensation system • Develop one customized Job Analysis Questionnaire • Analyze up to thirty (30) current job titles • Conduct an on-site and telephone employee interviews as needed • Develop a recommendations for each individual job title classification review • Recommend FLSA exemption status for up to thirty job titles • Draft job descriptions for all recommended job titles 	\$20,000
Step 2: Wage/Compensation Study Assumes the following: <ul style="list-style-type: none"> • Develop a customized salary market survey document with up to 100 benchmark job titles, to be distributed to no more than 12 public sector peer employers. • One draft and one final report of the market study findings 	\$40,000
Step 3: Recommendations Development Assumes the following: <ul style="list-style-type: none"> • Recommend updates to the current pay schedule(s) to cover all jobs covered by the study • Recommend grade assignment changes as justified by market data for all job titles covered by the study • Analyze pay compression • Draft language for recommended compensation policies including job reclassifications • Estimate the cost of implementing the updates to the pay schedule, including recommendations regarding placement of each employee within the pay ranges 	\$10,000
Step 4: Present Final Results to the County Assumes we develop and deliver one on-site presentation to the County Committee and County Commissioners Court	\$5,000
TOTAL FIXED FEE	\$75,000
Optional Service: Additional On-Site Meetings beyond the scheduled on-site meetings Assumes we attend meetings throughout the process with the Committee, employees, and/or County management to explain the methodology, survey results, and recommendations or to assist in the implementation of the plan.	\$3,500/day

The proposed fee includes charges for all professional, analytic, and administrative services, as well as all expenses associated with materials, supplies, overhead, and travel for all tasks outlined in this proposal except as otherwise noted.

Our total fixed fee will be billed at the end of each month in four (4) equal invoices for \$18,750.

Please note: if the information in the census file is inaccurate additional hourly fees may be charged for data correction and preparation.

Travel expenses for meetings scheduled less than one week in advance will be charged additionally. If a scheduled meeting is cancelled by the client, any non-refundable travel expenses will be billed to the client at cost.

To the extent our proposed scope and fees differ from your needs or the level of effort described in other proposals you may receive, Segal Waters is prepared to discuss alternatives to the fees stipulated in our proposal.

Our proposed fee assumes only the services and on-site meetings described in the proposal. Should the County request additional services or additional on-site meetings, we would charge the hourly rates shown below, as well as for the time and expenses associated with travel.

Staff Member	Title/Role	2018 Standard Hourly Rate
Elliot R. Susseles	Senior Vice President, Practice Leader	\$475
Ruth Ann Eledge	Vice President, Senior Consultant, Project Manager	\$385
Cristy Reetz	Associate Consultant	\$310
Melinda Castellon	Senior Associate	\$275
Holly Waggoner		
Fredericka Ogbazi	Associate	\$225