

IN THE COUNTY LEGISLATURE OF JACKSON COUNTY, MISSOURI

A RESOLUTION transferring \$70,500.00 within the 2019 County Improvement Fund and awarding a contract for the furnishing of a compensation study for use by the Human Resources Department to Evergreen Solutions, LLC of Tallahassee, FL, under the terms and conditions of Request for Proposals No. 55-18, at an actual cost to the County in the amount of \$70,500.00.

RESOLUTION NO. 20104, March 11, 2019

INTRODUCED BY Theresa Galvin, County Legislator

WHEREAS, the Department of Finance and Purchasing has solicited bids for the furnishing of a compensation study for use by the Human Resources Department; and,

WHEREAS, a total of eleven notifications were distributed and three responses were received and evaluated as follows:

<u>VENDOR</u>	<u>EVALUATION POINTS</u>
Evergreen Solutions Tallahassee, FL	93.8
Management Advisory Group Fairfax, VA	87
CBIZ St. Louis, MO	80

and,

WHEREAS, pursuant to section 1054.6 of the Jackson County Code, the Director of Finance and Purchasing recommends the award of a contract for a compensation study for use by the Human Resources Department to Evergreen Solutions of Tallahassee, FL, for

the reason that it has submitted the lowest and best bid received as set forth in the attached recapitulation and analysis; and,

WHEREAS, a transfer is needed in order to place the funds needed for this contract in the proper spending account; and,

BE IT RESOLVED by the County Legislature of Jackson County, Missouri, that the following transfer be made within the 2019 County Improvement Fund:

<u>DEPARTMENT/DIVISION</u>	<u>CHARACTER/DESCRIPTION</u>	<u>FROM</u>	<u>TO</u>
County Improvement Fund			
Non-Departmental			
Cnty Improvement			
013-5113	58020- Buildings & Improvements	\$70,500	
013-5113	56790- Other Contractual Services		\$70,500

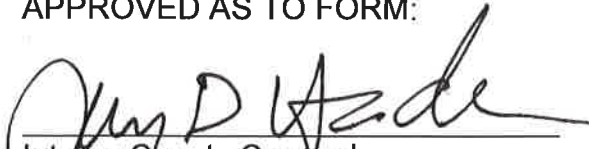
and,

BE IT FURTHER RESOLVED by the County Legislature of Jackson County, Missouri, that award be made as recommended by the Director of Finance and Purchasing, and that the Director be and hereby is authorized to execute for the County any documents necessary to the accomplishment of the award; and,

BE IT FURTHER RESOLVED that the Department of Finance and Purchasing is authorized to make all payments, including final payment on the contract.

Effective Date: This Resolution shall be effective immediately upon its passage by a majority of the Legislature.

APPROVED AS TO FORM:


Interim County Counselor

Certificate of Passage

I hereby certify that the attached resolution, Resolution No. 20104 of March 11, 2019, was duly passed on March 18, 2019 by the Jackson County Legislature. The votes thereon were as follows:

Yeas 8

Nays 0

Abstaining 0

Absent 1

3-18-19
Date


Mary Jo Spino, Clerk of Legislature

Funds Sufficient for this transfer are available from the sources indicated below.

ACCOUNT NUMBER: 013 5113 55020
ACCOUNT TITLE: County Improvement Fund
Non-Departmental Cnty Improvements
Buildings & Improvements
NOT TO EXCEED: \$70,500.00

There is a balance otherwise unencumbered to the credit of the appropriation to which the expenditure is chargeable and there is a cash balance otherwise unencumbered in the treasury to the credit of the fund from which payment is to be made each sufficient to provide for the obligation herein authorized.

ACCOUNT NUMBER: 013 5113 56790
ACCOUNT TITLE: County Improvement Fund
Non-Departmental Cnty Improvements
Other Contractual Services
NOT TO EXCEED: \$70,500.00

3/5/19

Date



Chief Administrative Officer



JACKSON COUNTY Human Resources Department

415 East 12th Street, First Floor
Kansas City, Missouri 64106
www.jacksongov.org

(816) 881-3135
Fax: (816) 881-3474

Date: February 21, 2019

To: Barbara Casamento
Purchasing Department

From: Dennis Dumovich, Director of Human Resources
Ed Stoll, CAO
Bob Crutsinger, Finance Director
Crissy Wooderson, Jackson County Auditor
Katherine Swing, Human Resources Administrator

Subject: Compensation Study RFP 55-18

It is the recommendation of the Compensation Study Review Committee to award the bid for RFP 55-18 to Evergreen Solutions, LLC. Three proposals were received, and Evergreen Solutions, LLC was selected by the committee as the best proposal.

Attached are the rating forms used by the committee to evaluate each proposal and as you can see, Evergreen, LLC received the highest average scores. Therefore, the bid should be awarded to Evergreen Solutions, LLC.

Please let me know if you have any questions.

Total
Average

RFP - Compensation Study

Bidder	Proposed			Experience		Total
	Responsiveness 10 pts	Method 30 pts	Qualifications 30 pts	References 15 pts	Pricing 15 pts	
Evergreen	10	28.6	28.6	12.6	14	93.8
MAG	10	27.2	23.2	14.2	12.4	87
CBIZ	10	26.8	18.8	14.4	10	80

4.0 *Response to Scope of Services*

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

4.1 Approach and Methodology

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

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

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

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



Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

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

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

Kick Off Meeting

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

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

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

Communication Plan

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

Employee Orientation and Focus Groups

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



sessions is provided to your project team in advance and refined to meet your needs.

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

Department Head Interviews

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

Job Assessment Tool and Management Issue Tool

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

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

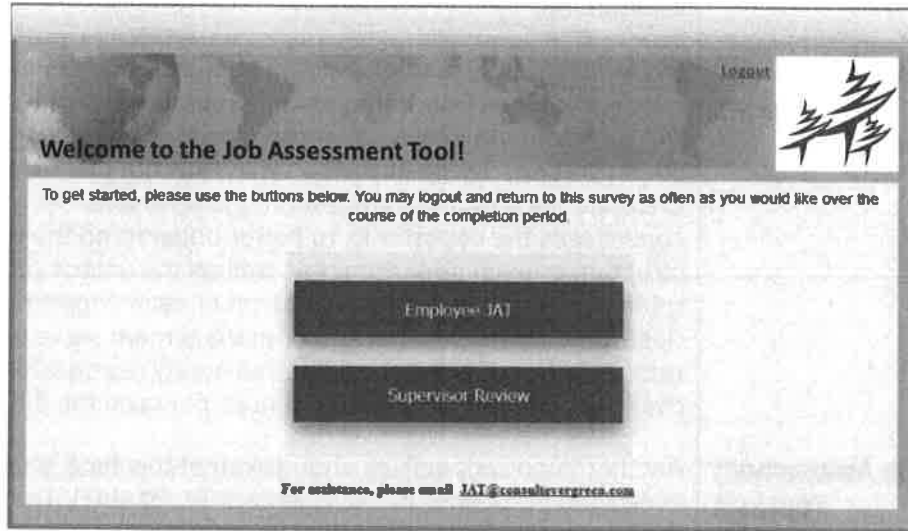
- scope of duties;
- complexity of work;
- supervision received and exercised;
- physical requirements;
- financial responsibilities;
- analytical/mental requirements;
- knowledge and skills required for the job; and
- level of responsibility/reporting relationships.

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



Exhibit 4-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.

**Exhibit 4-1
Supervisor's JAT Home Screen**



Source: Evergreen Solutions, 2018

Exhibit 4-2 illustrates how Evergreen Solutions uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of municipal employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen Solutions designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



Exhibit 4-2
Job Description and Responsibilities

Basic Job-Related Information

Job Introduction

Briefly provide an overview of your job, including a description of the purpose of your job and the type of work you do. This may be the same as the introduction to your current job description, but it does not need to be.

Description

2000

Type of Work

Please select the level that best describes the type of work you perform.

Type of Work

- Clerical/Manual - Performs a variety of office and administrative support duties OR unrelated labor-intensive tasks.
- Laborer/Trade-Related Occupations - Performs work necessitating repetitive operations with their hands, physical skill and energy.
- Technician/Para-Professionals - Performs tasks requiring a solid understanding of basic scientific and technical OR use of heavy equipment.
- Administrator - Performs tasks directly related to the management or general business operations. Exercises discretion and judgment with matters of significance.
- Managerial/Professional - Performs tasks requiring advanced knowledge, which is professionally, vocationally or academically based related to the control or administration of part of the organization.
- Executive/Advanced Professional - Performs tasks related to managing the organization, or managing a department OR perform work requiring highly advanced knowledge.

Education and Experience

Please select the level that best describes how much education and experience a new-hire should be required to have for your position.

Education -Select One-

Experience -Select One-

Licenses and Certifications

Please list any licenses, certifications, or professional designations you believe should be required or preferred for your position.

Requires

225

SAVE

Source: Evergreen Solutions, 2018

Exhibit 4-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen Solutions to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.



**Exhibit 4-3
Job Functions**

Logout

Essential Job Functions

On the lines provided, please include all essential job functions you perform. For every function you list, estimate the total percent of your time spent on each function on an annual basis and check off which tasks are a priority. A priority task is one that is core to your position.

Task	Percent	Priority	
Task 1	500	Priority	<input type="checkbox"/>
Task 2	500	Priority	<input type="checkbox"/>
Task 3	500	Priority	<input type="checkbox"/>
Task 4	500	Priority	<input type="checkbox"/>
Task 5	500	Priority	<input type="checkbox"/>
Task 6	500	Priority	<input type="checkbox"/>
Task 7	500	Priority	<input type="checkbox"/>
Task 8	500	Priority	<input type="checkbox"/>
Task 9	500	Priority	<input type="checkbox"/>
Task 10	500	Priority	<input type="checkbox"/>

Source: Evergreen Solutions, 2018

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



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



checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets

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

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

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

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

Unifying the Solution

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

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



Compensation Administration Guidelines

It is at this stage in the process that we typically meet with the client to identify the direction of the final solution. We will present to the client a draft report for review and comment. We typically ask the client to examine the draft solution objectively and provide insights and recommendations on the direction of the report. When this process is completed, Evergreen's consultants will proceed with the final solution. The solution also contains information regarding fiscal impact and implementation.

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

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

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

System Maintenance

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

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



but also increase the fairness and transparency of regular compensation and classifications tasks after solution implementation.

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

Exhibit 4-4
JobForce Manager Tool

Pay Plans	Scoring/Slotting	Compensation	Market		
Download Data	Grid Edit				
CURRENT TITLE	PAY PLAN	JAY SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)
Accounting Specialist II	ESP	212.3	\$30,100.27	\$34,220.80	\$31,508.00
Accounting Specialist III	ESP	221.3	\$38,058.27	\$34,378.43	\$40,213.98
Accounting Specialist IV	ESP	308.3	\$42,315.73	\$40,188.80	\$44,338.90
Accounting Supervisor	ESP	500.0	\$67,981.02	\$69,350.91	\$68,779.83
Acquisition Specialist	ESP	308.3	\$42,315.73	\$41,598.60	\$44,338.90
Administrative Aide	ESP	312.8	\$43,190.08	\$38,834.74	\$44,338.90
Administrative Recording Secretary	Professional	381.3	\$52,088.10	\$40,984.30	\$58,246.18
Administrative School Secretary I	ESP	308.3	\$39,285.91	\$31,819.17	\$33,084.13
Administrative School Secretary II	ESP	291.3	\$32,843.36	\$23,996.09	\$34,738.33
Administrative School Secretary III	ESP	288.3	\$30,800.82	\$27,701.80	\$28,299.01
Administrative Secretary I	ESP	231.3	\$32,843.36	\$32,190.02	\$33,084.13
Administrative Secretary I	ESP	208.3	\$29,285.91	\$32,190.02	\$33,084.13
Administrative Secretary II	ESP	231.3	\$32,843.36	\$33,919.04	\$34,738.33
Administrative Secretary II	ESP	221.3	\$32,843.36	\$33,919.04	\$34,738.33
Administrative Secretary III	ESP	258.3	\$35,800.82	\$35,971.01	\$38,299.01
Administrative Specialist	Professional	231.3	\$32,843.36	\$43,782.83	\$33,422.82
Administrative Specialist-School Food Services	Professional	275.0	\$38,243.91	\$42,981.08	\$45,636.61

Source: Evergreen Solutions, 2018

4.2 Detailed Work Plan

The detailed work plan that Evergreen Solutions proposes to use to provide Compensation Study Services to Jackson County is provided in this section. Evergreen understands that the County has 1,500 full- and 300 part-time employees in 450 job titles that will be included in the study. Note: According to Addendum #2, Evergreen understands that they will be required to meet with the Legislature upon selection before approval of the contract/agreement, and to present findings and recommendations near the completion of the contract/agreement. Evergreen will further be required to meet with the executive team upon selection before approval of the contract/agreement, discuss process and scope (Task 1 of our detailed work plan), mid project update, and to



present findings and recommendations near the completion of the contract/agreement.

Our work plan consists of the following 12 work tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Collect and Review Current Environment Data
- Task 4: Evaluate and Build Projected Classification Plan
- Task 5: Identify List of Market Survey Benchmarks
- Task 6: Identify Approved List of Targets
- Task 7: Conduct Market Survey and Provide External Assessment Summary
- Task 8: Develop Strategic Positioning Recommendations
- Task 9: Conduct Solution Analysis
- Task 10: Develop and Submit Draft and Final Reports
- Task 11: Develop Recommendations for Compensation Administration
- Task 12: Provide Revised Class Descriptions and FLSA Determinations

**Task 1.0
Project Initiation**

TASK GOALS

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

TASK ACTIVITIES

- 1.1 Meet with the County's Project Manager (CPM) and the executive team to discuss the following objectives:
- the classification and pay plan study process;
 - understand mission and current compensation philosophy (if any);
 - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
 - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
 - establish an agreeable communication schedule.



**Task 2.0
Evaluate the
Current System**

- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the County and some of the short- and long-term priorities. This activity serves as the basis for assessing where the County is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials from the County, including:
 - any previous projects, research, evaluations, or other studies that may be relevant to this project;
 - organizational charts for the departments and divisions, along with related responsibility descriptions;
 - current position and classification descriptions, salary schedule(s), and classification system; and
 - personnel policies and procedures, including step placement policies.
- 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.
- 1.5 Provide progress reports to the CPM.

KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of County staff

TASK GOALS

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

TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy. Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Review the County's current compensation plans, including salary, benefits, pay practices, and relates issues.
- 2.3 Determine the strengths and weaknesses of the current pay plan(s) and structure for the County.
- 2.4 Work with the CPM to draft a compensation philosophy of where the County desires to be in the market as it relates to pay.



**Task 3.0
Collect and Review
Current
Environment Data**

- 2.5 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

KEY PROJECT MILESTONES

- Review of existing compensation plan(s)
- Initial compensation philosophy
- Assessment of current conditions

TASK GOALS

- Conduct statistical and anecdotal research into the current environment within the County.
- Guide subsequent analytical tasks.

TASK ACTIVITIES

- 3.1 Schedule and conduct employee orientation sessions.
- 3.2 Meet with department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the CPM to administer the JATs and MITs. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.
- 3.5 Review any data provided by the County that may provide additional relevant insight.
- 3.6 Identify career ladders, paths, and promotional opportunities for occupations.

KEY PROJECT MILESTONES

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



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

TASK GOALS

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

TASK ACTIVITIES

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

KEY PROJECT MILESTONES

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

**Task 5.0
Identify List of
Market Survey
Benchmarks**

TASK GOAL

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

TASK ACTIVITIES

- 5.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the CPM to select up to 60 benchmarks that are representative of the County's positions for the salary survey.



**Task 6.0
Identify Approved
List of Survey
Targets**

- 5.2 Submit the proposed list of positions to the CPM for review.
- 5.3 Based on the CPM's review, make revisions to the benchmark list and finalize consistent with Evergreen's analysis.

KEY PROJECT MILESTONES

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

TASK GOAL

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

TASK ACTIVITIES

- 6.1 Review with the CPM the peer organizations that should be included in the survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary survey to include first class cities and counties in Missouri and Kansas, especially those with a charter form of government (e.g., St. Louis County, Jackson County and Greene County).
- 6.2 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
 - size of the organization;
 - geographic proximity to the Kansas City area;
 - economic and budget characteristics; and
 - other demographic data.
- 6.3 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 6.4 Review survey methodology with the CPM and refine survey methodology prior to distribution of survey.
- 6.5 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

KEY PROJECT MILESTONES

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



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

TASK GOALS

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

TASK ACTIVITIES

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

KEY PROJECT MILESTONES

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

**Task 8.0
Develop Strategic
Positioning
Recommendations**

TASK GOALS

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

TASK ACTIVITIES

- 8.1 Identify the compensation philosophy and accompanying thresholds.
- 8.2 Using the market salary and benefits data collected in **Task 7.0**, and the classification data reviewed in **Task 4.0**, determine the proper pay plans for the County.



**Task 9.0
Conduct Solution
Analysis**

8.3 Identify highly competitive positions within the County and customize recommendations for compensation where required.

8.4 Produce a pay plan(s) for the County that best meets its needs from an internal equity and external equity standpoint.

8.5 Identify career ladders/promotional opportunities as deemed appropriate.

KEY PROJECT MILESTONES

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

TASK GOALS

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

TASK ACTIVITIES

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

9.2 Place all classifications into pay grades based on **Task Activity 9.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.

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

9.4 Meet with the CPM to discuss the potential solutions.

9.5 Determine the best solution to meet the needs of the County in the short-term and long-term.

9.6 Document the accepted solution.

KEY PROJECT MILESTONES

- Initial regression analysis
- Potential solutions
- Documented final solution



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

TASK GOALS

- Develop and submit a draft and final report of the Compensation Study Services to Jackson County.
- Present the final report.

TASK ACTIVITIES

- 10.1 Produce a comprehensive draft report that captures the results of each previous step. Provide a draft final report to the CPM for review and approval. The draft final report will include the financial impact estimate for incorporating the recommendations.
- 10.2 Make edits and submit the necessary copies of the final report to the CPM.
- 10.3 Present the final report to executive team, and the Legislature, if requested.
- 10.4 Develop a communication plan for sharing study results with employees of the County.
- 10.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

**Task 11.0
Develop
Recommendations
for Compensation
Administration**

TASK GOALS

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

TASK ACTIVITIES

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



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

11.2 Recommend recruitment/retention strategies, where appropriate.

11.3 Present recommendations to the CPM for review.

11.4 Finalize recommendations.

11.5 Provide training to Human Resources staff on the utilization and maintenance of the recommended changes to the compensation and classification plan.

KEY PROJECT MILESTONES

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

Task 12.0 Provide Revised Class Descriptions and FLSA Determinations

TASK GOALS

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

TASK ACTIVITIES

12.1 Assess current class descriptions for form, content, validity, and ADA compliance.

12.2 Discuss new class description format with the CPM and the Human Resources Department staff.

12.3 Revise classification descriptions based on data gathered from the JAT process.



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- 12.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.
 - 12.5 Make FLSA determinations based on work performed and federal requirements.
 - 12.6 Recommend a systematic, regular process for reviewing job descriptions.

KEY PROJECT MILESTONES

- Updated class descriptions
- New class descriptions, as needed
- FLSA Determinations

**4.3
Proposed
Timeline**

Evergreen Solutions possesses the ability, staff, skills, and tools to provide Compensation Study Services to Jackson County in five months of the project start date and following the execution of the contract. This is based on a tentative start date of November 1, 2018, and a completion date of March 30, 2019.

Our proposed timeline, identified in **Exhibit 4-5** can be modified in any way to best meet the needs of Jackson County.



**Exhibit 4-5
Proposed Timeline**

PROJECT TASKS	2018		2019		
	NOV	DEC	JAN	FEB	MAR
1.0 - Project Initiation	█				
2.0 - Evaluate the Current System	█				
3.0 - Collect and Review Current Environment Data		█			
4.0 - Evaluate and Build Projected Classification Plan		█			
5.0 - Identify List of Market Survey Benchmarks			█		
6.0 - Identify Approved List of Targets			█		
7.0 - Conduct Market Survey and Provide External Assessment Summary			█	█	
8.0 - Develop Strategic Positioning Recommendations				█	
9.0 - Conduct Solution Analysis					█
10.0 - Develop and Submit Draft and Final Reports					█
11.0 - Develop Recommendations for Compensation Administration					█
12.0 - Provide Revised Class Descriptions and FLSA Determinations					█



7.0 Fees for Services

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

Our total, not-to-exceed, fixed fee to complete all tasks identified in our detailed work plan in **Section 4.0** of our proposal is **\$72,500**. Should the County desire a benefits survey to be conducted in addition to the Salary Survey, Evergreen would charge an additional **\$8,000**.

Our fees are all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our fee also includes up to eight onsite visits to Kansas City for purposes of completing the requested work. Onsite visits would include meetings with the executive team, staff, and the Legislature as outlined in Addendum #2. Any additional onsite visits that are needed would be billed at \$1,500 per onsite visit.

Our fee is based on the following major components detailed in the scope of services of the RFP:

- Job Audit and Analysis - \$26,000
- Update Job Descriptions - \$10,000
- Study of Compensation Structures - \$29,500
- Final Report - \$7,000

Total Fee - \$72,500

The following is our preferred invoicing schedule:

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

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

