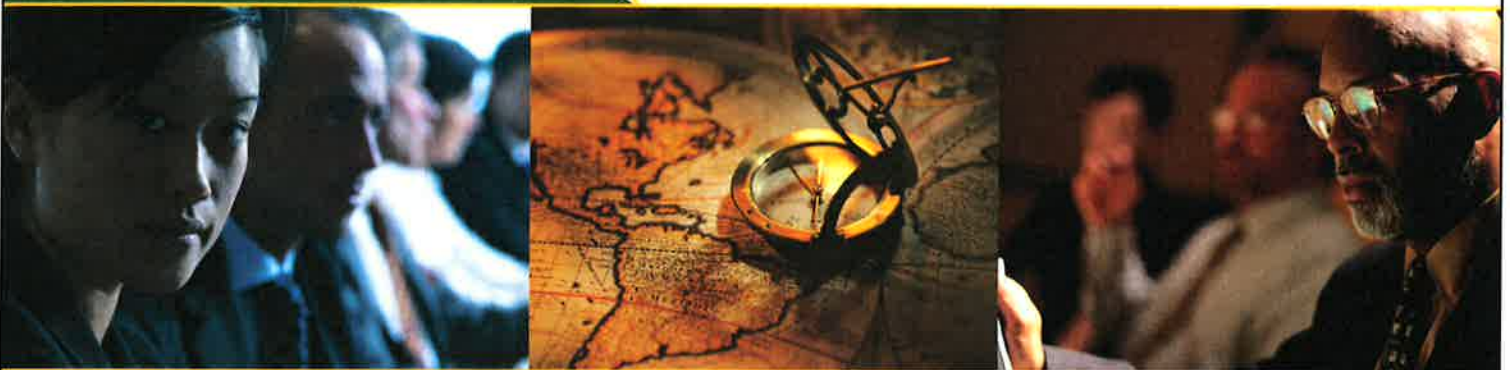


**A Proposal to Conduct a  
Staffing Model Analysis for the  
City of Belle Isle, FL  
RFP #2023-06**

**ORIGINAL**



Evergreen Solutions, LLC

**May 4, 2023**



## Evergreen Solutions, LLC

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

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May 2, 2023

Ms. Yolanda Quiceno, City Clerk  
City of Belle Isle  
1600 Nela Avenue  
Belle Isle, Florida 32809

Dear Ms. Quiceno:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Staffing Model Analysis for the City of Belle Isle. Our response is based on our review of your Request for Proposal (RFP #2023-06), our experience working with hundreds of local governments throughout the country and our knowledge of best practices in local government human resources management. **Evergreen is well qualified to provide the services being requested by the City of Belle Isle as we have worked with more than 1,100 public sector organizations throughout the country in providing a variety of human resource consulting, including many staffing studies.**

Evergreen was formed in 2004 to provide an alternative to traditional consulting practices. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider.

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 46 states. In the State of Florida, Evergreen has worked with, or is currently on contract to work with, the following public sector organizations in various human resource and management capacities: City of Sunrise; City of Tamarac; City of Hollywood; City of Plantation; City of Delray Beach; City of Deltona; City of Doral; City of North Miami Beach; City of Palm Beach Gardens; City of Parkland; City of Destin; City of Panama City; City of Panama City Beach; City of Pensacola; City of Apalachicola; City of Sopchoppy; City of Alachua; City of Bartow; City of Bunnell; City of Bushnell; City of Cape Coral; City of Clermont; City of Cocoa; City of Coral Springs; City of Dania Beach; City of Daytona Beach; City of Daytona Beach Shores; City of Dunedin; City of Fort Walton Beach; City of Ft. Myers; City of Gainesville; City of Green Cove Springs; City of Groveland; City of High Springs; City of Holly Hill; City of Holmes Beach; City of Homestead; City of Holy Hill; City of Indian Harbour Beach; City of Jacksonville; City of Jacksonville Beach; City of Key West; City of Kissimmee; City of Lake City; City of Largo; City of Maitland; City of Marathon; City of Melbourne; City of Miramar; City of Cooper City; City of New Port Richey; City of New Smyrna Beach; City of North Port; City of Ocala; City of Orange City; City of Orlando; City of Palm Bay; City of Plant City; City of Punta Gorda; City of Sarasota; City of Sebring; City of St. Cloud; City of St. Petersburg; City of Sunny Isles Beach; City of Temple Terrace; City of Venice; City of West Melbourne; City of Winter Park; City of Zephyrhills; Bay County; Santa Rosa County; Okaloosa County; Walton County; Gadsden County; Gulf County; Leon County; Wakulla County; Franklin County; Charlotte County; DeSoto County; Hardee County; Collier County; Highlands County; Sarasota County; Monroe County; Palm Beach County; Miami-Dade County; Pinellas County; Marion County; Manatee County; Martin County; Seminole County; Sumter County; Orange County; Brevard County; Flagler County; Lake County; Alachua County; Hernando County; Osceola County; Citrus County; Miami Shores Village; Village of North Palm Beach; Village of Pinecrest; Village of Islamorada; Town of Lake Park; Town of Jupiter; Town of Cutler Bay; Town of Davie; Town of Longboat Key; Town of Lady Lake; Town of Orange Park, FL; Town of Palm Beach; and many others.

Evergreen Solutions is able to fully comprehend the challenges and goals of the City of Belle Isle because of our vast understanding of local government human resources, and the fact that we possess the necessary experience and qualifications. Our team has significant expertise in conducting staffing studies and similar HR consulting work for local governments and other public sector organizations, as evidenced in **Section 3** of our proposal. Detailed resumes are available upon request.

Some of the human resource services Evergreen has focused on include: staffing studies; workload analyses; classification and compensation studies; salary and benefits surveys; performance evaluation and appraisal system design; HR department reviews; recruitment, hiring, and retention studies; and strategic and workforce planning.

Through our experiences in conducting this wide range of projects, we have gained the knowledge of every aspect of the management and operations involved in local government human resources management. We have developed helpful methods and tools that assist clients in implementing and maintaining our study recommendations.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. We have attached all of the required forms, including a certificate of insurance demonstrating that we can meet the City's requirements.

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

Sincerely,

Dr. Jeff Ling, President  
Evergreen Solutions, LLC



ATTACHMENT A

NON-DISCRIMINATION AFFIDAVIT

I, the undersigned, hereby duly sworn, depose and say that the organization or business entity represented herein shall not discriminate against any person in its operations, activities, or delivery of services under any agreement it enters with the City of Belle Isle. The same shall affirmatively comply with all applicable provisions of Federal, State, and local equal employment laws and shall not engage in or commit any discriminatory practice against any person based on race, age, religion, color, gender, sexual orientation, national origin, marital status, physical or mental disability, political affiliation or any other factor which cannot be lawfully used as a basis for service delivery.

It is the policy of the City of Belle Isle that Minority/Women-Owned Business Enterprises (MWBE) shall have the maximum opportunity to participate in all contracts. The City of Belle Isle will accept MWBE certifications from Orange County and any State of Florida certification.

Further, City Purchasing Police Section 1.8 requires that all contracting agencies of the City, or any department thereof, acting for or on behalf of the City, shall include in all contracts and property contracts hereinafter executed or amended in any manner or as to any portion thereof, a provision obligating the Contractor not to unlawfully discriminate (as proscribed by federal, State, county, or other local law) on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, sexual orientation, gender identity or expression, marital status, pregnancy, familial status, veterans status, political affiliation, or physical or mental disability and such person's association with members of classes protected under this chapter or in retaliation for or opposition to any practices forbidden under this chapter against any employee of, any City employee working with, or applicant for employment with such Contractor and shall require such Contractor to include a similar provision in all subcontracts executed or amended there under.

By:

Dr. Jeff Ling

Title:

President

STATE OF FLORIDA

COUNTY OF

Leon

Sworn to and subscribed before me this

1<sup>st</sup>

day of

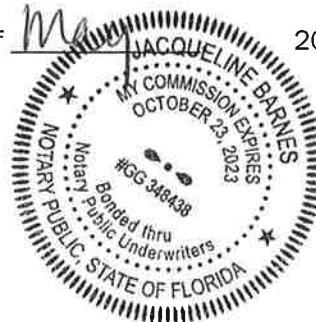
May

2023, by

Jacqueline Barnes  
Signature of Notary Public

☒ Personally known, or  
☐ Produced Identification

Type of ID Produced:



ATTACHMENT B

NON-DEBARMENT AFFIDAVIT

Page 1 of 2

Dr. Jeff Ling Being first duly sworn, deposes and says that:

He/She is President  
of Evergreen Solutions LLC the Proposer ("Respondent")  
that has submitted the attached Proposal. By offering submission to this RFP, the Respondent certifies  
and affirms that to the best of their knowledge and belief, that:

1. The Respondent is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any transaction of any Federal, State, or local agency; and
2. The Respondent has not within three years preceding this Proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records; making false statements; or receiving stolen property; and
3. The Respondent is not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph 2 of this affidavit; and
4. The Respondent has not, within a three-year period preceding this Proposal, had one or more public transactions (Federal, State, or local) terminated for cause or default; and
5. The Respondent will submit a revised Debarment Affidavit immediately if the status changes.

If the Respondent cannot certify that they are not debarred, he/she shall explain with this submittal. An explanation will not necessarily result in denial of participation in a contract. Failure to submit a debarment affidavit will disqualify the Contractor from any contract award.

\_\_\_\_\_ Check here if an explanation is attached to this affidavit.



NON-DEBARMENT AFFIDAVIT

Page 2 of 2

By: [Signature]

Print Name: Dr. Jeff Ling

Title: President

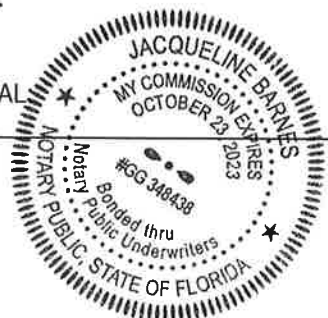
Date: 5/1/2023

STATE OF FLORIDA  
COUNTY OF Leon

The foregoing Agreement was acknowledged before me this 1<sup>st</sup> day of May 2023 by, Dr. Jeff Ling

who has affirmed that he/she has been duly authorized to execute the above document. He/she is personally known to me or has produced \_\_\_\_\_ as identification.

NOTARY'S SEAL



NOTARY PUBLIC, STATE OF FLORIDA

Jacqueline Barnes  
Name of Acknowledger, typed, printed, or Stamped

ATTACHMENT C

DRUG-FREE WORKPLACE CERTIFICATION

Preference must be given to vendors submitting a certification with their bid/proposal certifying they have a drug-free workplace in accordance with Section 287.087, Florida Statutes. This requirement affects all public entities of the State and becomes effective January 1, 1991. The special condition is as follows:

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids that are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program; a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by any employee who is so convicted.
6. Make a good faith effort to maintain a drug-free workplace through the implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Evergreen Solutions, LLC  
COMPANY NAME

  
VENDOR'S SIGNATURE

Must be executed and returned with the attached Proposal to be considered.

ATTACHMENT D

NON-COLLUSIVE AFFIDAVIT

State of FL

County of Leon

Dr. Jeff King being first duly sworn deposes and says that:

1. He/she is the President (Owner, Partner, Officer, Representative, or Agent) of Evergreen Solutions, LLC the Proposer that has submitted the attached Proposal;
2. He/she is fully informed respecting the preparation and contents of the attached Proposal and of all pertinent circumstances respecting such Proposal.
3. Such a Proposal is genuine and is not a collusive or sham Proposal.
4. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, have in any way colluded, conspired, connived, or agreed, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the Work for which the attached Proposal has been submitted; or to refrain from proposing in connection with such Work; or have in any manner, directly or indirectly, sought by agreement or collusion, or communication, or conference with any Proposer, firm, or person to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit, or cost elements of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the proposed Work;
5. The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Proposer or any other of its agents, representatives, owners, employees, or parties in interest, including this affiant.

By: [Signature]

Title: President

Company: Evergreen Solutions, LLC

STATE OF FLORIDA

COUNTY OF Leon

Sworn to and subscribed before me this 1<sup>st</sup> day of May

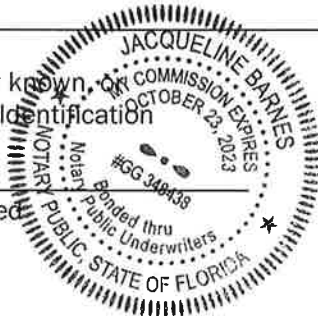
2022

by

☒ Personally known  
☐ Produced Identification

Type of ID Produced

[Signature]  
Signature of Notary Public





ATTACHMENT E

CERTIFICATION PURSUANT TO FLORIDA STATUTE § 287.135

I, Dr. Jeff Ling President on behalf of Evergreen Solutions, LLC  
Print Name and Title Company Name  
certify that Evergreen Solutions, LLC does not:

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.

Submitting a false certification shall be deemed a material breach of contract. In writing, the City shall provide notice to the Contractor of the City's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the City's determination of false, certification was made in error then the City shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the City from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, FS or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the City for goods or services may be terminated at the option of the City if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Evergreen Solutions, LLC

COMPANY NAME

Dr. Jeff Ling

PRINT NAME

President

TITLE

SIGNATURE

Must be executed and returned with the attached Proposal to be considered.



EVERSOL-01

MSTOKES

**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

4/28/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Hub International Florida 1117 Thomasville Road Tallahassee, FL 32303	<b>CONTACT NAME:</b>	<b>PHONE (A/C, No, Ext):</b> (850) 386-1111	<b>FAX (A/C, No):</b> (850) 385-9827
	<b>E-MAIL ADDRESS:</b>		
<b>INSURED</b>  Evergreen Solutions, LLC 2528 Barrington Circle Unit 201 Tallahassee, FL 32308	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	<b>INSURER A : Cincinnati Indemnity Company</b>		<b>23280</b>
	<b>INSURER B : Hartford Casualty Insurance Company</b>		<b>29424</b>
	<b>INSURER C : Twin City Fire Insurance Company</b>		<b>29459</b>
	<b>INSURER D :</b>		
	<b>INSURER E :</b>		
<b>INSURER F :</b>			

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ENP0586601	8/17/2020	8/17/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			EBA0586601	8/17/2022	8/17/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			ENP0586601	8/17/2020	8/17/2023	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	21WECAB8IM0	10/24/2022	10/24/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	<b>Professional Liab</b>			21PG025884622	8/17/2022	8/17/2023	per claim \$ 2,000,000
C	<b>Professional Liab</b>			21PG025884622	8/17/2022	8/17/2023	aggregate \$ 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**City of Belle Isle, FL  
1600 Nela Avenue  
Belle Isle, FL 32809

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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# Response to Request for Proposals

Evergreen Solutions is well qualified to conduct a Staffing Model Analysis for the City of Belle Isle due to our experience in conducting these studies for many local governments and other public sector organizations across the country. As required in the Request for Proposals, we have provided the following sections:

1) Background and Experience; 2) Approach, Methodology, and Work Plan; 3) Key Personnel; and 4) Total Project Cost.

## **1. Background and Experience**

In this section, we provide the background and history of Evergreen, a list of similar projects we have conducted, and references.

### **1.1 Background and History**

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

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

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

Evergreen is located at 2528 Barrington Circle, Unit 201, Tallahassee, Florida with additional offices in Tampa, Orlando, and Fort Lauderdale. Evergreen employs 27 full-time professionals who provide a variety of human resources consulting.

Evergreen’s main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services. Our areas of expertise include: staffing studies; workload analyses; classification and compensation studies; salary and benefits surveys; performance evaluation reviews; organizational reviews; HR department reviews; training assessments; and strategic planning.

We invite you to browse our Web site at [www.ConsultEvergreen.com](http://www.ConsultEvergreen.com) or visit us on LinkedIn at [www.linkedin.com](http://www.linkedin.com) for more information about our services, staff, and past experience.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country. **Exhibit 1** includes a sample list of public sector clients in the State of Florida that our consultant team has worked with, or is currently in contract to work with, in providing a variety of human resource consulting services, including staffing studies.





### Exhibit 1: Florida Public Sector Clients

City of Alachua	City of St. Petersburg	Flagler County Sheriff's Office
City of Bartow	City of Tallahassee	Lake County Sheriff's Office
City of Bushnell	City of Tamarac	Leon County Sheriff's Office
City of Cape Coral	City of Temple Terrace	Manatee County Sheriff's Office
City of Clearwater	City of Titusville	Monroe County Sheriff's Office
City of Clermont	City of Venice	Nassau County Sheriff's Office
City of Cocoa	City of West Melbourne	Okaloosa County Sheriff's Office
City of Coral Gables	City of Winter Park	Pasco County Sheriff's Office
City of Coral Springs	City of Sunrise	Volusia County Sheriff's Office
City of Dania Beach	City of Zephyrhills	Walton County Sheriff's Office
City of Daytona Beach	Alachua County	Florida Sheriff's Association
City of Daytona Beach Shores	Bay County	Florida Association of Counties
City of Delray Beach	Brevard County	Florida League of Cities
City of Deltona	Charlotte County	FL Association of Court Clerks/Comptrollers
City of Destin	Citrus County	FL Public Human Resource Association
City of Doral	DeSoto County	Board of Bar Examiners
City of Dunedin	Escambia County	The Florida Bar
City of Fort Myers	Flagler County	Hillsborough County Clerk of Court/Comptrollers
City of Fort Walton Beach	Gulf County	Ft. Pierce Utilities Authority
City of Green Cove Springs	Hardee County	Keys Energy Services
City of Groveland	Hernando County	Kissimmee Utility Authority
City of Hallandale Beach	Highlands County	Utilities Commission of New Smyrna Beach
City of High Springs	Hillsborough County	Florida Keys Aqueduct Authority
City of Holly Hill	Lake County	Sarasota Bay Estuary Program
City of Hollywood	Leon County	Toho Water Authority
City of Holmes Beach	Manatee County	Tampa Bay Water
City of Key West	Martin County	Peace River Manasota Reg. Water Supply Auth.
City of Jacksonville	Miami-Dade County	St. Johns River Water Management District
City of Jacksonville Beach	Miami Shores Village	Southwest Florida Water Management District
City of Kissimmee	Monroe County	South Florida Water Management District
City of Lake City	Okaloosa County	Loxahatchee River District
City of Largo	Orange County	Okaloosa Gas District
City of Maitland	Osceola County	Lake Apopka Gas District
City of Marathon	Palm Beach County	Solid Waste Authority of Palm Beach County
City of Melbourne	Pinellas County	CareerSource Pinellas
City of Miramar	Santa Rosa County	CareerSource Northeast Florida
City of New Smyrna Beach	Sarasota County	Worknet Pinellas
City of North Lauderdale	Seminole County	Association for Institutional Research
City of North Miami Beach	Wakulla County	Florida Telecommunications Relay, Inc.
City of North Port	Town of Cutler Bay	Orange County Library System
City of Ocala	Town of Davie	Pinellas Housing Authority
City of Oldsmar	Town of Jupiter	Manatee County Clerk's Office
City of Orange City	Town of Lade Lake	Gadsden County Property Appraiser's Office
City of Orlando	Town of Lake Park	Brevard County Property Appraiser's Office
City of Palm Bay	Town of Longboat Key	Monroe County Property Appraiser's Office
City of Palm Beach Gardens	Town of Medley	Brevard County Tax Collector
City of Panama City	Town of Palm Beach	Flagler County Tax Collector
City of Panama City Beach	Town of Ponce Inlet	Palm Beach County Tax Collector
City of Parkland	Town of Orange Park	Highlands County Clerk of the Circuit Court
City of Pensacola	Village of North Palm Beach	Leon County Clerk of the Circuit Court
City of Plant City	Village of Pinecrest	Health Care District of Palm Beach County
City of Plantation	Alachua County Sheriff's Office	Hillsborough Area Transit Authority
City of Punta Gorda	Bay County Sheriff's Office	Orlando-Orange County Expressway Authority
City of Sarasota	Clay County Sheriff's Office	Sarasota-Manatee County Airport
City of Sebring	Collier County Sheriff's Office	Northwest Florida Beaches International Airport





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## 1.2 List of Similar Projects

The following is a sample of some of the similar local government work we have conducted or are currently under contract to conduct.

**Staffing Study - Leon County Sheriff's Office, Florida:** Evergreen Solutions is engaged with the Leon County Sheriff's Office to conduct a Staffing Study. Evergreen will perform the following: collect current Key Performance Indicators (KPIs) and other outcome-related data; develop and issue benchmarking survey to collect level, staffing, and KPI results from relevant peer organizations; develop a peer staffing matrix based on KPI and/or outcome measure variation that includes the expected staffing range by job level; utilize comparison data from benchmark survey peers in the peer staffing matrix to assess organizational structure and staffing levels; identify jobs by level that fall outside of the estimated staffing thresholds; develop staffing model based on current strategic needs, comparison of KPI results, and peer thresholds; provide recommended staffing levels for future years, using data from County on population growth projections, provide recommendations for future staffing needs of the LCSO; create a matrix that identifies all gaps between the current and desired staffing by level and functional area of the LCSO; estimate the overall resource and cost savings for each change or gap based on the current and proposed staffing model; and submit a final report that summarizes results and links recommendations and outcomes from the study.

**Staffing Study - City of Fort Myers, Florida:** Evergreen Solutions was engaged with the City of Fort Myers to conduct a Staffing Study of the Police Department. Evergreen performed the following tasks: developed a project plan summarizing tasks, milestones, and deliverables; conducted five interviews and four focus groups with various department stakeholders; reviewed current pay distribution of all ranks and identified pay challenges (i.e. compression, high volume of employees maxed out, etc.); analyzed current turnover trends by rank or level; explored development of additional ranks in the career structure to align with peers and best practices; amended and updated current career development plan (CDP), including what would be needed for promotion, and the pay increases of promotion; provided recommendations on patrol shift make-up to align with recommended rank structure changes; and created a new compensation plan to align with recommended CDP, including one step approach and one alternative approach (hybrid or open).

**Performance Audit - City of Pensacola, Florida:** Evergreen Solutions was engaged with the City of Pensacola to conduct an Efficiency Study (which included a staffing analysis) of the Clerk's Office. Evergreen performed the following tasks: met with the City Clerk and the Assistant City Clerk; examined statutory guidelines; documented major processes; determined common and best practices among a subset of peers; and developed and presented findings and recommendations.

**Human Resource Audit (included a Staffing Study) - City of Cape Coral, Florida:** Evergreen Solutions was hired by the City of Cape Coral to conduct an audit of the City's human resource function. The City Auditor worked closely with Evergreen Solutions' staff to create tools for data collection, set benchmarks for comparison, and determine recommendations for improving overall efficiency and effectiveness, including customer service. The study resulted in recommendations in staffing, processes, operations, and overall performance.

**Compensation and Classification Study and Staffing Analysis - City of Daytona Beach Shores, Florida:** Evergreen Solutions was retained by the City of Daytona Beach Shores to conduct a Compensation and Classification Study that included a staffing analysis and the development of a Performance Appraisal System. Evergreen's consultants assessed the conditions within the City's current compensation and classification systems and provided a summary. The Job Assessment Tool (JAT) and



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Management Issues Tool (MIT) was used to build a projected classification plan and develop preliminary recommendations. Evergreen prepared and conducted a customized market salary survey and provided an external assessment summary, as well as a staffing analysis. Comparison data from a representative group of comparable targets were included in the analysis. A final report was developed, outlining the methodology and results of the study, including all market research and recommendations. Recommendations were also developed for future Compensation Administration and updating and creating new job descriptions.

**Staffing Study - City of Powder Springs, Georgia:** Evergreen was hired by the City of powder Springs to conduct a City-wide Staffing Study. Evergreen's consultants performed the following tasks: conducted project kickoff meetings; collected relevant City data; conducted staff and leader interviews to assess existing operations; conducted, documented and reviewed existing operations including workflow and workload analysis; developed and collected peer staffing and outcomes survey; conducted workload and key performance indicator (KPI) analyses; and reported results and provided recommendations including staffing/organizational re-design.

**City of Fayetteville, Georgia:** Evergreen Solutions was retained by the City of Fayetteville to conduct a Staffing Study of the following departments and provide recommendations for the appropriate number of staff for the Finance, Community Development, Economic Development and Public Works/Water Department as compared to peer organizations.

**Departmental Job Analysis, Classification and Efficiency Study - Town of Colchester, Vermont:** Evergreen Solutions was retained by the Town of Colchester to assist with an efficiency and effectiveness review of Town operations. The study included a multi-disciplinary approach to gaining input from employees, managers, elected officials, and citizens. Data was collected through employee focus groups, employee and manager surveys, manager interviews, community survey, employee job analysis, benchmark analysis, and process review sessions. An overall operational model was created to summarize Town operations that linked employee tasks, major functional activities, key business processes, and services or programs together for all levels of the organization and analyzed the value, performance and resources for each element.

The results of the model were compared to current and potential outcomes through gap analysis and a series of recommendations were created to address the current and future needs of the Town. Each recommendation was coupled with specific actions plans, timelines, resource outcomes, and assignment of duties. In addition, the current classification structure was updated to ensure that the documented division of work matched organizational reality.

**Operations Review/Efficiency Study (included a Staffing Analysis) - City of Norwalk/Norwalk Public Schools, Connecticut:** Evergreen Solutions was engaged with the City of Norwalk to conduct an Operations Review/Efficiency Study of the City and the school district. The primary purpose of the study was to identify and coordinate with the City to implement specific strategies to improve the efficiency of City government and K-12 public school operations in order to improve the value of government and educational services delivered to the community. The Departments within the City's scope, include: Information Technology; Community Services (i.e., Health Department, Human Services, Early Childhood, Youth Services, Human Relations and Fair Rent, and Library); Corporation Counsel; Finance (i.e., Comptroller, Management and Budgets, Purchasing, Tax Assessor, and Tax Collector); Economic and Community Development (i.e., Business Development and Tourism, Code Enforcement, Planning and Zoning, and Transportation, Mobility and Parking); Fire (Emergency Management); HR and Personnel; Operations and Public Works (i.e., Building Management, Engineering, Highways, and Recreation and Parks); Police; and Town Clerk. Some of the Departments within Norwalk Public Schools in the scope includes: Facilities; Finance; Grants; Health Services; Human Resources; Information Technology; Operations; Maintenance; Purchasing; Recruiting/Talent Acquisitions; and Transportation.



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Evergreen's consultants performed the Efficiency Study in two parts for both the City and Norwalk Public Schools. In Part 1, Evergreen's consultants researched and analyzed the current performance by identifying areas where there was a high potential to improve efficiencies within the scope of the project, measuring and mapping the current state of the identified area; and analyzing the current state to determine the likely causes of inefficiencies. In Part 2, Evergreen's consultant identified the obstacle(s) to implement the recommendations; developed countermeasures to address the causes of inefficiencies; and designed the future state of the workflows with integrated countermeasures.

**Management, Organizational Structure, and Efficiency Study (included Staffing Analysis) - Town of Carolina Beach, North Carolina:** Evergreen Solutions was engaged with the Town of Carolina Beach to conduct a management, organizational structure, and efficiency study. The objective of this study was to review all Town Departments, current management structure, staffing, and current/future staff workloads and to make recommendations regarding the most effective and efficient management and organizational structure and staffing to meet the service levels expected by elected officials, Town residents, business owners, and visitors. The study was performed in conformance with the following directives:

- review current and past organizational structures and staffing levels;
- review and summarize current services provided and staff workloads for all departments (winter and summer);
- determine what is working well with the Town's organizational structure and staffing levels and determine the areas that may need improvement;
- compare and contrast the Town's organizational structure, services, and staffing levels with other similar sized cities in North Carolina and other industry staffing standards, if available;
- review current and future Town services and workloads to determine the most effective and efficient management and organizational structure to meet the demands and expectations of elected officials, Town residents, business owners, and visitors; review current and future Town tax structure to other towns of similar size and makeup.
- determine a method of assessing the health of the organization's culture, internal relationships, and attitudes toward the workplace. Depending on the outcome of the assessment, determine effective measures to improve those areas that need addressing;
- determine cost saving measures that could be implemented that will allow similar or increased levels of service and that will improve overall efficiency; and
- identify performance measures that may result in assessing the effectiveness of those recommendations that are implemented.

**Performance Audit and Financial Review - Davie County, North Carolina:** Evergreen Solutions was retained by Davie County to conduct a comprehensive Performance Audit of Davie County Departments as well as a detailed Financial Review of Davie County Public Schools. The first part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness of Davie County operations from a departmental standpoint. The second segment of the study, the financial review of school operations, aimed at assisting Davie County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.



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The initial phase of the study involved a careful analysis of county government operations in each department, including human resources, information technology, public safety, health, social services, solid waste and water, tax, and several other departments. Specifically, Evergreen reviewed past reports and existing data sources, conducted interviews, and established a channel for community input to begin the analysis. Next, Evergreen's team benchmarked Davie County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.

**Performance Audit and Financial Review - Lee County, North Carolina:** Lee County hired Evergreen Solutions to conduct a comprehensive Performance Audit of Lee County Departments as well as a detailed Financial Review of Lee County Public Schools (LCPS). The first section of the study, the financial review of school operations, aimed at assisting Lee County Public Schools in continuing to succeed and improve in its primary mission, the education of all students. The second part of the study, the performance audit, focused on the organizational, operational, and financial efficiency and effectiveness of Lee County operations from a departmental standpoint. In the end, Evergreen presented findings and recommendations to key stakeholders on containing costs, improving management strategies, and improving the overall efficiency, effectiveness, and productivity of the county and the school district.

Concurrent with the review of school district financial operations, Evergreen conducted phase two of the study; an analysis of county government operations in each department. Specifically, Evergreen reviewed past reports and existing data sources (policies, organizational charts, financial audits, job descriptions, salary schedules, employee handbook, etc.), conducted interviews, and established a channel for community input to begin the analysis. Next, Evergreen's team benchmarked Lee County operations to operations in peer districts using comparative data and statistical analysis. Pairing the outcome of this analysis with findings from on-site reviews and interviews, Evergreen determined areas where the county could make improvements to existing processes, plans, and procedures.

**Organizational Structure Review (i.e., Staffing Study) of Transportation Unit - City of Raleigh, North Carolina:** Evergreen Solutions was engaged with the City of Raleigh to review the organizational structure of the Transportation Planning service unit. For this review, Evergreen consultants: reviewed the overall organizational structure of the Transportation Planning service unit; met with and gain an understanding of the team members in the service unit; determined whether the current organizational structure best met the needs of the service unit; and made recommendations on how to improve the organizational structure to enhance efficiency and effectiveness.

**Efficiency and Effectiveness Study - Land-of-Sky Regional Council, North Carolina:** Evergreen Solutions was hired by the Land-of-Sky Regional Council in North Carolina to conduct an Efficiency and Effectiveness Study. The foundation of Evergreen's approach to conducting this study centered on the simple premise of aligning needs with resources in an optimal manner. Strategic needs were the main driving force for the Council in examining its direction and alignment. Strategic needs included the expectations of citizens, the needs of the community, and the relative resources available to the Council. Therefore, in conducting the performance audit, Evergreen consultant's: assessed the organizational effectiveness and operational performance levels of the Regional Council; assisted the Regional Council in continuing accomplishments through a steadfast commitment to efficient and effective support operations; identified, initiated, and institutionalized best practices, which could be identified from other government or private industry providers of similar service or functions, throughout the Regional Council; identified potential savings associated with implementing best practices; identified costs to implement recommendations; and develop an implementation plan to realize quickly the maximum benefits.

In the end, Evergreen developed findings, commendations, and recommendations for containing costs and improving management strategies that led to better and more efficient expenditures of funds.



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**Performance Audit of the Health Department - Yadkin County, North Carolina:** The purpose of the Performance Audit was to conduct an objective and systemic examination of the Health Department using a structured and professionally adopted methodology to evaluate overall efficiency, effectiveness, and productivity. The foundation of Evergreen's approach methodology for this study was based on the simple premise of aligning needs with resources in an optimal manner; specifically, alignment of communication, resources, processes, and organizational objectives.

Evergreen's conceptual model for completing such a study was designed with a top-down approach. That is, higher level strategic needs such as citizen expectations, community needs, and relative resources are first assessed during the audit. Then, individual service models for specific functional areas are analyzed. Finally, operational components such as organization and management, resources management, and policies and procedures are assessed for inefficiencies. This top-down approach is optimal for identifying areas in which the Health Department can become more efficient, effective, and productive. In the end, Evergreen presented a final report of the findings, commendations, and recommendations to the Yadkin County Board of County Commissioners which will provide specific recommendations and implementation plans to optimize Yadkin Health Department's overall performance.

**Organizational/Staffing Study - Town of Clayton, North Carolina:** Evergreen Solutions was retained by the Town of Clayton to conduct an Organizational/Staffing Study. Evergreen obtained and analyzed reports and background materials pertinent to the study; collected current Key Performance Indicators (KPIs) and other outcome-related data; prepared and submitted a summary of findings highlighting strategic needs, major services areas, functional areas, and major programs; collected benchmark data from peers relating to staffing; developed a peer staffing matrix based on KPI and/or outcome measure variation that included the expected staffing range by job level; evaluated and assessed the Town's overall organizational structure and staffing levels in each department; and prepared a summary of findings.

**Organizational Assessment of the Human Resources Department - York County, South Carolina:** Evergreen Solutions was engaged with York County to conduct an Operational Assessment of the County's Human Resource Function. Evergreen's consultants conducted a comprehensive review on the operational effectiveness and the identification of process improvements and other methods of optimizing service to the County in the areas of employee relations; HR compliance review; employee recruitment; and training and organizational development. Evergreen further evaluated the Human Resources Department for effectiveness including, but not limited to: staffing of operations and providing recommendations for staffing levels and patterns to aid in efficiency, cost-effectiveness, and service; use of technology and management information systems; and process improvements and workflows for HR related communications and decision making.

**Comprehensive Classification and Compensation Study (Included a staffing analysis) - City of Odessa, Texas:** Evergreen Solutions was retained by the City of Odessa to conduct a Comprehensive Classification and Compensation Study. Evergreen's consultants reviewed the current classification structure and proposed retention, redesign, or replacement and reviewed all current compensation plans including non-salary/wage remuneration and non-cash components (benefits and perquisites) to develop an understanding of the City's total compensation structure. Evergreen further performed the following tasks: reviewed current staffing levels for both public safety and non-public safety departments with regard to identified objective criteria; provided recommendations for consolidation or division of current departments, staff level changes, justifications for resulting staffing levels in each of the 10 departments, and methodology for changing future staffing levels; delivered and designed implementation methodology and timelines for a competency-based system for applicable jobs which could be integrated into the classification and compensation deliverables; designed and delivered a performance evaluation system which could be used to drive the recommended classification and compensation career progression models; and designed and delivered a permanently licensed, software-based succession planning system that integrated Evergreen's deliverables which included components to identify positions to be monitored, evaluate personnel readiness, and manage organization-wide succession gaps and opportunities.





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**Classification and Compensation Study and a Staffing Analysis - City of Harlingen, Texas:**

Evergreen Solutions is retained by the City of Harlingen to conduct a Classification and Compensation Study and a Staffing Analysis. Evergreen's consultants will perform the following tasks: provide for a comprehensive evaluation of every job class within the City to establish appropriate classification and pay grade assignments as well as pay ranges and step progressions within the ranges; conduct a compensation survey of the market including comparable Texas municipalities, and, appropriate private sector competitive employers; prepare a new salary structure based on the results of the survey and best practice research; analyze and recommend changes to the present compensation structure to meet market analysis; review current compensation plan (salary grade levels and steps) and understand current challenges in recruiting and retaining employees; recommend and identify a consistent and competitive market position that the City can strive to maintain; review staffing levels and make recommendations; recommend appropriate salary range for each position based on the proposed classification plan, the compensation survey results, internal equity and external parity; prepare a new salary structure based on the results of the survey and best practices; recommend implementation strategies including calculating the cost of implementing the plan; identify any extreme current individual or group compensation inequities and provide a recommended corrective action plan and process to remedy these situations; recommend and provide implementation strategies related to other key compensation practices, based on market demands; and present findings and recommendations to City Administration as well as the Harlingen City Commission at a regularly scheduled commission meeting. **Note:** This project is nearing completion.

**Staffing Analysis - City of Lakeway, Texas:** The City of Lakeway hired Evergreen Solutions to conduct a Staffing Study, as an extension to their Compensation and Classification Study that was conducted by Evergreen's consultants, to resurvey Police Departments that were a part of the original study to determine additional information about their overtime policies, and precisely the manner in which these departments scheduled sworn officers and dispatchers.

**Staffing Study - City of Pflugerville, Texas:** Evergreen Solutions was engaged with the City of Pflugerville to conduct a staffing study. Evergreen's consultants performed the following tasks: held a kickoff meeting with the City's Project Manager and integral stakeholders to review study scope, milestones, and data required; collected relevant information related to the City, department, and staff; conducted department director interviews to understand areas of responsibility/provided services and staffing needs/shortfalls; reviewed JAT responses from included departmental staff; developed staffing benchmark survey; selected benchmark organizations for comparison; collected and analyzed staffing benchmark survey data; determined the appropriate staffing level by department or functional area; and assemble findings and recommendations for review by the City's Project Manager.

**Comprehensive Management and Efficiency Review (Included Staffing Analysis) - City of Fountain, Colorado:** As part of an ongoing effort to improve the efficiency and effectiveness of its operations and management, the City of Fountain, Colorado, a growing city near Colorado Springs, hired Evergreen Solutions to conduct a comprehensive management and performance review of its operations.

In Phase I, Evergreen Solutions consultants conducted a thorough diagnostic review of the Fountain's structure, management, and organizational issues. Chief among those was the tremendous growth the city has experienced since the late '90s, and which is projected to continue. This growth has led to a strain on limited resources within the city and a need to identify strategic priorities for the future.

In Phase II of the study, the Evergreen Solutions team conducted an in-depth analysis of the city's overall organizational structure, financial operations, human resources management, public safety operations, public works, and utilities management. The overriding goal of the study was to assist the city in determining where resources needed to be directed to accomplish its goals, where resources were being utilized inefficiently, and the best approach to realign resources to sustain positive community development.

In 2008, the City of Fountain again engaged Evergreen Solutions to facilitate the development of the City's comprehensive strategic plan. In the context of the plan development, the following major tasks will be completed over a six-month period:



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- Conduct Internal, External, and Market Analysis;
  - Develop City Mission, Vision, and Strategic Priorities;
  - Develop City Administrative Goals and Objectives; and
  - Develop Budget Linkage Plan.

Evergreen Solutions will be responsible for conducting a community-wide outreach program to solicit input, identifying the City's major strengths and weaknesses as well as core values, and developing a comprehensive plan to address five-year goals and objectives to guide the City and its development.

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

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

**Nebraska Department of Health and Human Services - Comprehensive Human Resources Operations and Process Review Assessment:** Evergreen Solutions was retained by the State of Nebraska Department of Health and Human Services (DHHS) to assist with reviewing its internal human resource function through a strategic planning process. The seven-month process included four phases. Each phase was designed to meet the state's objectives of implementing an efficient and effective human resource operation. Phase one, Project Initiation, included the finalization of the work plan and collection of data.

During Phase two, Environmental Scanning and Stakeholder Involvement, Evergreen Solutions' consultants assessed customer satisfaction, analyzed and evaluated different business processes, conducted interviews, and identified organizational obstacles or barriers to service delivery. The third phase, Development of Department Structure and Service Delivery Strategy, included tasks to meet the state's objectives to identify opportunities and strategies for improving the service delivery process, as well as to identify processes that can be streamlined, and conduct a cost-benefit analysis of services. Finally, in Phase four, Development of Department Structure and Service Delivery Strategy, our consulting team created an overall implementation plan and delivered recommendations for the functional and process transitions.



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### 1.3 References

As required in the Request for Proposals, we have provided the following references that we feel demonstrate our experience as it relates to the services being requested by the Cit of Belle Isle. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

#### **Staffing Study**

##### **Leon County Sheriff's Office, Florida**

**Contact Information:** Mary P. Nicholson, Assistant Chief of Staff & Director of Human Resources, 2825 Municipal Way, Tallahassee, Florida 32304, (850) 606-3360, [nicholsonm@leoncountyfl.gov](mailto:nicholsonm@leoncountyfl.gov)



#### **Staffing Study**

##### **Town of Clayton, North Carolina**

**Contact Information:** Rich Cappola, Torn Manager, 111 E. Second Street, Clayton, North Carolina 27520, (919) 553-5002, [rcappola@townofclaytonnc.org](mailto:rcappola@townofclaytonnc.org)

**Note:** This study is nearing completion.



#### **Comprehensive Classification and Compensation Study and Staffing Study**

##### **City of Odessa, Texas**

**Contact Information:** Charles Hurst, Director of Human Resources, 411 W. 8<sup>th</sup> Street, Suite 104, Odessa, Texas 79762 (432) 335-4158, [churst@odessa-tx.gov](mailto:churst@odessa-tx.gov)

**Note:** This study is nearing completion



## 2. Approach, Methodology, and Work Plan

In this section we include our methodology and approach to conduct a Staffing Model Analysis for the City of Belle Isle; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of services of the RFP; and a proposed timeline.

### 2.1 Approach and Methodology

Strategic needs should be the main driving force in examining the direction and alignment of the organization. Strategic needs include the expectations of citizens, the needs of the community, and the relative resources available. The operational components of each service are the factors that determine the success of the individual service provision. These are organization and management, resource management, policies and procedures, and service delivery. The operational components not only drive the service model—in best practice organizations they lead to the desired outcomes:



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- **Efficiency** – how well resources are being used in a process (input/output);
  - **Effectiveness** – how well a process produces the desired outcome (meets citizen needs and expectations); and
  - **Productivity** – how much is produced based on the capacity to produce (how much could be done in comparison to what is being done).

The specific objectives for a staffing analysis would be to develop findings, commendations, and recommendations for containing costs and improving management strategies in affected departments, ultimately leading to better and more efficient expenditures of the organization's funds.

The foundation of Evergreen's approach centers on the simple premise of aligning needs with resources in an optimal manner. Although this is one of the most obvious steps to creating a successful organization, it is one of the hardest to accomplish. Alignment by definition implies that communication, resources, processes, and organizational objectives come together in an efficient manner. When this does not occur, a "gap" is present.

In order to assess the nature of the gap and find the optimal solution, some basic questions must be answered:

- What are the needs of the organization?
- How do those needs differ across units or groups?
- What level of service is necessary to meet those needs?
- What are the priorities of the needs?
- What resources are currently available to address the needs?
- What is the current performance of those resources?
- What are the causal factors contributing to any gaps between actual performance and performance goals?
- Are the resources the correct resources?
- What are the types of resources?
- Are more or less of a type of resource needed?
- Are the resources organized and managed in order to maximize performance?
- Are the processes appropriate for the resource distribution?
- How might the overall system of delivery be improved?
- What are the time and resource constraints to accomplishing performance optimization?
- What is the implementation plan?

In keeping with these questions, Evergreen Solutions has a methodology that includes steps for garnering and analyzing the information necessary to:



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- Define the needs of the organization.
  - Determine the performance necessary to meet the needs.
  - Assess the current level of performance for services.
  - Evaluate the resources (staffing, technology, etc.) employed to address the organization's needs.
  - Analyze processes and structures supporting the major business functions.
  - Assess the gap between needs/standards and current performance.

## **2.2     Detailed Work Plan**

In this section we provide a detailed work plan for how we will accomplish all the work being requested by the City of Belle Isle.

### **Task 1.0 - Project Initiation**

**TASK GOALS:** Finalize the project plan with the City's Project Manager (CPM); finalize any remaining contractual negotiations; and establish an agreeable final time line for all project milestones and deliverables.

#### **TASK ACTIVITIES**

- 1.1 Meet with the CPM to discuss the following objectives: understand the City's mission and current strategic plan (if any); review our proposed methodology, approach, and project work plan to identify any necessary revisions; reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the City and some of the short and long-term priorities. This activity serves as the basis for assessing where the City is going and the major operational needs.
- 1.3 Discuss the project critical path and methods for addressing project challenges.
- 1.4 Review and edit the project work plan and submit a schedule to the CPM for the completion of each project task.

**KEY PROJECT MILESTONE:** Comprehensive project management plan

### **Task 2.0 – Data Collection**

**TASK GOALS:** Collect and review existing studies, reports and other pertinent data; identify strategic needs and service areas; and identify concerns and clarify duties and responsibilities within the City.

#### **TASK ACTIVITIES**

- 2.1 Meet with the CPM and determine available and/or previously collected resources.





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- 2.2 Obtain and analyze reports and background materials pertinent to the study, including: City's strategic plan, mission, vision, goals, objectives and performance standards; position descriptions; organization charts and flow charts of work processes; current and prior year's budgets (previous two years); independent financial audits; recent financial audits and internal audit reports; expenditure reports; staffing data that reflects resource allocation and utilization; administrative and financial policies, procedures and practices; personnel policies, procedures and practices; current workload and workload trend information; service level reports including performance measures; outcome measures, KPI (Key Performance Indicators), and operating statistics; employee database, including name, department, unit, compensation, tenure, performance, training, and other incumbent details; and other relevant data that may impact the findings and conclusions of this study.
  - 2.3 Create a draft list of strategic needs and service areas for the City's Administration, Police Department and Public Works Department and share with the CPM.
  - 2.4 Revise the draft list of strategic needs and service areas based on feedback from the CPM.
  - 2.5 Design service model to be completed in the remainder of the phase based on the strategic needs and service areas.

**KEY PROJECT MILESTONES:** Collection of existing data pertinent to this study; summary of high-level strategic needs and services areas; and framework for service model

### **Task 3.0 – Document and Review Existing Operations**

**TASK GOALS:** Review current operation and identify functional areas and major programs within the City's Administration, Police Department, and the Public Works Department.

### **TASK ACTIVITIES**

- 3.1 Interview key staff and stakeholders, identified in conjunction with the CPM, to validate strategic needs and service areas, clarify duties and responsibilities, document current functional areas, summarize major programs, and answer specific questions regarding departmental organization and operations of the City to assure a valid understanding of the City.
- 3.2 Assign functional areas and major programs within the City to the specific strategic needs and service areas and weight the allocated resources. Review the associated activities for consistency and feasibility.
- 3.3 Update the service model and provide it to the CPM for review and feedback.
- 3.4 Develop written profile for each service area within the City that includes:
  - Structure – what programs and organizational structure are in use and what other approaches have been utilized?
  - Activities – how is work organized at the process, task, and activity level?
  - Resources – what financial, human capital, culture, knowledge, technology, space, and other inputs are in use?



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- Outcomes – what measures capture service success? What indicators of success as insight into inputs, processes, and outputs?
- 3.5 Prepare and submit summary of findings highlighting strategic needs, major services areas, functional areas, and major programs.
- 3.6 Discuss the results with the CPM and other staff associated with the project to validate the results.

**KEY PROJECT MILESTONES:** Completion of interviews; preliminary summary of operations; completion of major sections of the service model

#### **Task 4.0 – Process Analysis and Improvement**

**TASK GOALS:** Provide overview of the process analysis and improvement methodology and tools; collect and analyze process data by service area; and identify areas for process improvement.

##### **TASK ACTIVITIES**

- 4.1 Provide briefing to the CPM on the process analysis and improvement tools.
- 4.2 Hold training session with relevant staff and stakeholders to introduce the process analysis and improvement tools.
- 4.3 Conduct sessions or collect through electronic means process and sub-process data for each service and program area from relevant staff and stakeholders.
- 4.4 Link process information to structure, resources (financial, human, and technology), and outcome measures.
- 4.5 Estimate resource needs by process, program, and service area.
- 4.6 Update the service model and provide it to the CPM for review and feedback.

**KEY PROJECT MILESTONES:** Staff and stakeholder training; process and sub-process information; and process linkages

#### **Task 5.0 – Operational Requirements and Best Practice and Benchmarking Research**

**TASK GOALS:** Determine the major federal, state, and local requirements for each service, functional, and program area within the City; identify best practices that can be applied to the City; benchmark KPIs and outcome measures; and research best practices by each service, functional, and program area; create a document that summarizes requirements and operational expectations; and collect competency proficiency data from current incumbents.

##### **TASK ACTIVITIES**

- 5.1 Discuss with the CPM the plan for reviewing operational requirements of the City's Administration, Police Department and the Public Works Department.
- 5.2 Conduct research on the major federal, state, and local requirements.



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- 5.3 Create a detailed document which summarizes the major requirements by service, functional, and program area within the City. The document will include a requirements matrix that can be readily used during later phases and discussion purposes.
  - 5.4 Identify peers to include for best practice review.
  - 5.5 Collect data from peers on best practices, benchmarks (including KPIs), services, resources (staffing), processes, and outcomes.
  - 5.6 Conduct best practice and benchmarking review for each service, functional and program area within the City.
  - 5.7 Assess the extent to which best practices could be applied to the City's Administration, Police Department, and Public Works Department.
  - 5.8 Develop a list of possible improvements based on results of the best practices review.
  - 5.9 Create a best practice matrix.
  - 5.10 Develop a benchmark threshold comparison matrix including acceptable levels based on current service model.

**KEY PROJECT MILESTONES:** Requirements matrix and document; peer comparison (benchmark) matrix; and best practice matrix

#### **Task 6.0 – Conduct Staffing Analysis**

**TASK GOALS:** Evaluate and assess the City's overall organizational structure and staffing levels in the City's Administration, Police Department, and the Public Works Department; collect and analyze employee competencies; identify areas for potential improvements in efficiency and effectiveness; compare staffing data from other similar entities based on benchmarks; and compare survey data to Evergreen's national survey benchmark database.

#### **TASK ACTIVITIES**

- 6.1 Review select job descriptions.
- 6.2 Collect competency proficiency data from current incumbents.
- 6.3 Compare supporting core competencies to those demonstrated by incumbents and identify major gaps.
- 6.4 Discuss the results with the CPM.
- 6.5 Identify the supporting core competencies necessary to provide high quality services based on the major operation/service categories of the City's Administration, Police Department, and the Public Works Department.
- 6.6 Utilize comparison data from peers of similar size regarding organizational structure and staffing levels for departments similar to the City's Administration, Police Department and Public Works Department.



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- 6.7 Prepare and schedule interview guides to ensure that interviews address issues identified in best practice, process, and outcome comparisons.
  - 6.8 Conduct interviews with a sample of staff from the departments.
  - 6.9 Compare data obtained from focus groups and interviews as well as comparison of data to benchmark data.
  - 6.10 Determine areas of threshold gaps and identify underlying factors, when possible.
  - 6.11 Develop organizational design model that aligns with programs, services, and desired outcomes.
  - 6.12 Develop staffing model based on best practices, peer benchmark, data, resources and desired outcomes for each function, service area within the City's Administration, Police Department and Public Works Department.
  - 6.13 Identify supporting strategies that align with the staffing model.
  - 6.14 Prepare summary of findings to the CPM and HR team. Identify areas needing improvement.

**KEY PROJECT MILESTONES:** Competency analysis; select staff interviews; proposed organizational design; and proposed staffing model

#### **Task 7.0 - Conduct Gap Analysis and Make Recommendations**

**TASK GOALS:** Review organizational policies and procedures related to the various departments within the City; evaluate performance and management structure; and assess resource alignment.

#### **TASK ACTIVITIES**

- 7.1 Review findings from the previous tasks.
- 7.2 Create a matrix that identifies all gaps between the current and desired operations of the City's Administration, Police Department and Public Works Department.
- 7.3 Conduct detailed efficiency and effectiveness analysis of the service, functional, and program areas of the City's Administration, Police Department and Public Works Department. Include in the analysis the following elements: objectives, priorities, and programs of City's Administration, Police Department and Public Works Department; current workload and workload trend information; services and service levels provided by the City's Administration, Police Department and Public Works Department; activity and task assignments; staffing levels and needs; communications and workflow among the various organizational units; the maximization of efficiency of existing resources; and major process improvements that will increase efficiency and effectiveness;
- 7.4 Identify areas of missing services, duplicate services, overlapping services, and potential opportunities and update the gap matrix.
- 7.5 Estimate the overall resource and cost savings for each gap addressed and assign each previously identified gap a priority based on the cost and benefit analysis.
- 7.6 Select the best option for implementation.



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- 7.7 Write recommendations and action plans for the highest priority areas.
  - 7.8 Provide details on the action plan that includes a time line, resources needed, and assigned roles.
  - 7.9 Identify if the recommendation is linked to another and how they are linked.
  - 7.10 Create a summary document that links recommendations and outcomes from the study.
  - 7.11 Discuss the recommendations with the CPM and other key stakeholders. Recommendations will include an estimate of the cost savings to implement each recommendation.

**KEY PROJECT MILESTONES:** Efficiency and effectiveness analysis; updated gap analysis matrix; list of potential improvements; and recommendations and detailed action plans

### **2.3 Proposed Timeline**

Evergreen possesses the ability, staff, skills, and tools to conduct the Staffing Model Analysis for the City of Belle Isle in three months of the project start date and following the signing of the contract. This is based on a tentative start date of May 15, 2023, and a completion date of August 15, 2023, which is within the recommended timeline in the RFP. This proposed project timeline can be modified in any way to best meet the needs of the City.

### **3. Key Personnel**

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

**Dr. Jeff Ling, CCP – Project Principal (will have contractual authority and responsibility for the success of the study).** Dr. Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) who has more than 25 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

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

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





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

- **Compensation/Classification/Staffing Studies**– He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. **Note: He has served as the Project Principal for more than 1,100 public sector projects related to Classification, Compensation, and/or Staffing Studies.**
- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

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

**Ms. Stasey Whichel – Project Director (she will be the day-to-day contact with the City for Evergreen).** Ms. Whichel is a Project Manager who has been with the firm almost two years. She has over 25 years of experience in the public sector. As a former public sector Deputy Director, she demonstrated experience in policy development, strategic planning, human resource management, budgeting, and risk evaluation.

Ms. Whichel acquired public sector experience in project management, conducted programmatic audits and reviews to ensure compliance with state and federal rules and regulations, developed programmatic operating procedures, drafted internal management policies, and identified areas for efficiencies and improvements. She has also conducted reviews of relevant state and federal legislation and drafted bill analysis and agency comments. She led a team through an organizational realignment to better fit contemporary management needs, leveraged outside funding sources, and trained staff members on state and federal programs. As a member of agency leadership, she collaborated on HR policy reviews, conducted salary compensation studies, and developed recommendations for legislative budget issues. She also participated in the development of multi-faceted, long-term strategies designed to achieve agency and division goals, established metrics, and evaluated programmatic performance. She developed survey tools to measure employee satisfaction and identify staff needs and used findings to inform management decisions and created opportunities to improve staff morale. Her HR experience also includes the development of documents related to job advertisements, position descriptions, objective performance expectations, and performance reviews. She is experienced in applicant selection, on-boarding, identifying training requirements, and mentoring staff.

Ms. Whichel possesses expertise in the following areas: conducting organizational studies, staffing studies, evaluating risk, and reviewing operational procedures; providing guidance for change management; developing workflow and process design; identifying specific training needs; on-boarding new staff; conducting classification, compensation, and salary comparison studies; preparing employee



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surveys and valuations of employee satisfaction; working with leadership to develop or update agency policies, programs, and guidelines; developing Job descriptions and performance management tools; fostering employee communications; and administering contracts, accounting and auditing principles.

Some of the Florida public sector clients that Ms. Whichel has been involved with include in an HR capacity: Hardee County; Seminole County; City of North Port; Town of Lake Park; City of Bunnell; City of Punta Gorda; City of Homestead; Barefoot Bay Recreation District; Solid Waste Authority of Palm Beach County; North Collier Fire Control and Rescue District; Monroe County Property Appraiser; Marion County Hospital District; School Board of Sarasota County; City of Palm Bay; Charlotte County; Orange County; Children's Trust of Miami Dade County; Service Management Solutions for Children (SMS) and Partnership for Strong Families (PSF); Town of Medley; Early Learning Coalition of Pinellas County; City of West Melbourne. She has also directed staffing studies for Town of Clayton, North Carolina and for the City of Harlingen, Texas.

Ms. Whichel possesses a Bachelor of Science degree in Biology from The Florida State University.

**Mr. Mark Holcombe – Project Consultant.** Mr. Holcombe is a Project Manager at Evergreen Solutions who has been with the firm almost six years. He has spent extensive time studying both micro and macro-economic labor markets, public sector economics, and has studied econometric modeling for displaying and communicating data in an effective way. He has been using his economics background both in running a business and in consulting since graduation.

Mr. Holcombe's role with Evergreen has focused on compensation and classification studies utilizing market data. His primary responsibilities include: working closely with project teams and project managers in coordinating salary and benefit survey initiatives; evaluating market data from surveys, government agencies, and private sector databases to provide comprehensive reviews of compensation packages; and designing clear and concise reports and displays to communicate nuanced results.

Mr. Holcombe has served on the Evergreen Team for more than 100 HR studies. For example, he conducted staffing studies for the City of Raleigh, NC; Leon County Sheriff's Office, FL; City of Fort Myers, FL; City of Odessa, TX; Tarrant County College District, TX; and the City of Norwalk, CT.

Mr. Holcombe holds a Bachelor Degree in Economics with a concentration in Behavioral Economics and Criminology from Florida State University.

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

During his career, Mr. Williamson has served on boards of directors for more than two dozen public, private, civic and charitable organizations. This includes time as Chairman of the Santa Rosa County Board of County Commissioners, FL, RESTORE Council, Tourist Development Council, Florida/Alabama Transportation Planning Organization and as a member of the Florida Gulf Consortium, Florida Association of Counties Executive Board, Leadership Santa Rosa, and the Institute for County Government to name a few. He is also a member of the Florida Rural Water Association.



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Mr. Williamson helps organizations create new strategic pathways to solve complex problems. His areas of focus include policy development, strategic planning, change management, government services, transportation planning, master planning, tourism, RESTORE Act implementation and leadership development.

Mr. Williamson has certifications from the Cambridge Leadership Institute and the Kenan-Flagler Business School Leadership Institute and possesses a Bachelor of Science Degree in Sociology from Florida State University.



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

#### **4. Total Project Cost**

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 2.2** is **\$47,500**. Our cost is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two onsite visits to the City to perform the requested work.

Our preferred invoicing schedule is as follows:

- 33% - upon completion of Tasks 1 – 3
- 33% - upon completion of Tasks 4 – 5
- 34% - upon completion of Tasks 6 - 7

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

