



Proposal to City of Breezy Point for Organizational Assessment

Contact Information:

Rachel T. Parker, Human Resources Analyst

Brandon M. Fitzsimmons, Shareholder Attorney

525 Park Street, Suite 470

Saint Paul, MN 55103

Phone: (651) 225-8840

Email: rtparker@flaherty-hood.com

Website: www.flaherty-hood.com

September 15, 2023

September 15, 2023

David Chanski
City Administrator
City of Breezy Point
dchanaski@cityofbreezypointmn.us

VIA EMAIL

Re: City of Breezy Point Request for Proposals (RFP) for Organizational Assessment

Dear David:

Providing legal, analytical, and lobbying services to primarily greater Minnesota cities has been Flaherty & Hood, P.A.'s primary focus since the firm's inception over 30 years ago. We are, therefore, pleased to submit this proposal to the City of Breezy Point for an Organizational Assessment. We are committed to modeling diversity and inclusion and maintaining an inclusive environment with equitable treatment for all.

Why Should the City of Breezy Point Hire Flaherty & Hood?

There are many reasons why the City of Breezy Point should hire Flaherty & Hood, P.A. (Flaherty & Hood or firm), including:

1. **Customized**. Flaherty & Hood will not view the City of Breezy Point as just another client among many; instead, the City of Breezy Point study will be tailored to the City's circumstances, given high priority, and the timing of the study will be discussed early in order to meet deadlines set.
2. **Comprehensive**. No other firm offers the same comprehensive services that Flaherty & Hood provides—including labor relations, employment law, human resources, and legal services. For example, Flaherty & Hood developed and utilizes its customized *Organizational Questionnaire* for organizational purposes. In addition, Flaherty & Hood **advises and represents public sector entities** in complying with or claims made by employees under discrimination, disability, and wage and hour laws and labor contract negotiations and grievances, which is valuable in implementing organizational changes.
3. **Comprehensible**. Flaherty & Hood strongly believes that the advice and work product it provides to clients must be comprehensible. The firm has a proven record of communicating advice and recommendations on complex legal, human resources, and organizational issues in a manner its clients understand. Flaherty & Hood provides user-friendly electronic documents for public sector entities to review and update job analyses, job descriptions, job evaluation ratings, and the base pay structure.
4. **Cost-Effective**. Because Flaherty & Hood has dedicated its practice to serving the needs of public entities, we can provide significantly reduced public rates to our clients, while maintaining the highest quality services.

Enclosed is Flaherty & Hood's proposal to conduct an Organizational Assessment for the City of Breezy Point. The proposal includes the information requested in the *Request for Proposals (RFP) FOR Organizational Assessment*.

Flaherty & Hood will comply with all the conditions specified in the RFP.

We are confident that Flaherty & Hood will provide the highest quality organizational services to the City of Breezy Point. Should you desire to discuss our services in more detail or need additional information, please contact us. Thank you for your consideration, and we look forward to hearing from you soon.

Very truly yours,

FLAHERTY & HOOD, P.A.

/s/ Rachel T. Parker
Rachel T. Parker
Human Resources Analyst

/s/Brandon M. Fitzsimmons
Brandon M. Fitzsimmons
Shareholder Attorney

TABLE OF CONTENTS

Consultant Information.....	1
Statement of Methods and Procedures.....	6
Work Plan.....	8
Cost of Services.....	10
Clients.....	12

CONSULTANT INFORMATION

Description of Firm

With decades of serving Minnesota local governments, including Breezy Point, Flaherty & Hood, P.A. understands the public sector's unique organizational needs. Over the years, we have provided labor relations, employment law, and human resource services, including organizational and job classification and compensation services, to numerous public entities serving populations from 1,000 to 300,000. We are committed to modeling diversity and inclusion and maintaining an inclusive environment with equitable treatment for all.

Flaherty & Hood, P.A. is a unique law firm located in St. Paul, Minnesota that effectively integrates the disciplines of law, government relations, fiscal and human resources analysis, and communications to provide high-quality, timely and cost-effective services to our clients.

Flaherty & Hood, P.A. has 16 attorneys, 3 analysts, and 15 other professional staff who primarily provide legal, analytical, and legislative advocacy services for municipalities. The firm's labor, employment, and human resources practice area provides related legal, analytical, and representation services. Flaherty & Hood, P.A. is, therefore, uniquely positioned and has the comprehensive knowledge, experience, and tools to provide full service job classification and compensation analysis and implementation strategies for its municipal clients.

Organizational, Job Classification, and Compensation System Services

Flaherty & Hood, P.A. understands public sector entities' unique **organizational, job classification, and compensation** needs and provides the following services:

Organizational

- Direction and alignment of the city as a whole, departments, employees and services
- Workflow processes and organizational structure
- Workforce staffing, productivity and retention
- Workplace environment
- Communication, innovation and collaboration

Job Analysis

- Review job classification systems
- Conduct incumbent and supervisor interviews and observe jobs
- Prepare and analyze job questionnaires
- Draft and update job descriptions and determine FLSA status and ADA requirements

Job Evaluation

- Prepare comparisons of jobs to determine job worth using internal and external methods

Compensation

- Identify market entities and sources and conduct surveys utilizing statistical analysis
- Draft classification and compensation systems
- Establish pay structures and compensation packages
- Provide training and user-friendly electronic tools to implement job classification systems

Pay Equity

- Review, analyze, and recommend changes to ensure legal compliance
- Prepare any required pay equity report for the state and/or federal government
- Advise and provide representation in any contested matter involving legal compliance

To meet the classification, compensation, and organizational needs of our organizational clients, Flaherty & Hood, P.A.:

- Developed and utilizes its own **job analysis questionnaires, organizational questionnaires, and job evaluation system** for job classification purposes and **sophisticated statistical methods** to identify an organization's comparable entities and to develop a customized classification and compensation system.
- Provides classification and compensation clients **user-friendly electronic documents** for clients to review and update their organizational structure, job analyses, job descriptions, job evaluation ratings, and the base pay structure.
- Drafts and provides **resolutions, pay and options for implementation outlines, organizational charts, plans, and policies** for governing bodies for approval.

Labor, Employment Law, and Human Resources Services

Flaherty & Hood, P.A. also provides the following related **labor, employment law, and human resources** services to dozens of public entities:

- Labor Law
 - Contract negotiations
 - Grievances
 - Mediations
 - Arbitrations
 - Unfair labor practices
 - Strikes
 - Labor agency proceedings
- Employment Law
 - Representation and advocacy in state and federal courts, administrative, civil service, mediation, arbitration, and unemployment insurance hearings
 - Advice on hiring, performance improvement, legal claims, disciplinary matters, and reorganizing
 - Training seminars for supervisors and employees
 - Investigations
 - Legal compliance
- Human Resources
 - Personnel policies and practices
 - Hiring and disciplinary processes
 - Performance appraisal systems

Consultants

The following qualified and experienced Flaherty & Hood, P.A. personnel would provide classification and compensation services to the City of Breezy Point.



Project Manager: Rachel Parker is a Human Resources Analyst with the law firm of **FLAHERTY & HOOD, P.A.** Rachel compiles, reviews, researches, and develops analysis in the areas of job classification and compensation, labor relations, and employment matters for public sector clients. Rachel has a Bachelor of Science in Speech, Language, and Hearing Science from Minnesota State Moorhead University and her Masters of Business Administration, Human Resource Management from Capella University. She is a member of SHRM, Twin Cities Compensation Network, and World at Work Compensation Institute.

Work Experience

FLAHERTY & HOOD, P.A.

St. Paul, Minnesota

Human Resources Analyst

Conducts job classification and compensation work, including conducting job analyses, drafting job descriptions, assigning job evaluation ratings, conducting salary surveys, and creating compensation structures. Performs organizational studies addressing services, staffing, organization, and reporting structures, surveying comparable entities, and preparing analysis and recommendations.

THRIFTY WHITE PHARMACY

Plymouth, Minnesota & Remote

Human Resources Benefits Specialist

Oversaw employees' benefit forms and Court order forms; processed termed employee's benefits; supported with audits relating to benefits; and performed E-Verify, COBRA, FMLA, and EEO.

ROOF TO DECK

St. Paul, Minnesota

Human Resources Manager / Accounting

Processed payroll system information; assisted with annual benefit processing; onboarding of new employees including new hire paperwork and orientation; maintain employee files and HR filing system, working on productivity reports, general ledgers, entering receipts, and invoices.

Education

Capella University

Master's in Business Administration, Human Resource Management

Minnesota State Moorhead University

B.S., Speech, Language, and Hearing Science

Professional Associations

Twin Cities Compensation Network

World at Work Compensation Institute Minnesota

Society for Human Resources Management



Brandon M. Fitzsimmons is a shareholder attorney with the law firm of **FLAHERTY & HOOD, P.A.** Brandon provides legal advice and representation services for public entities in labor relations, employment law, and human resources matters. Brandon has his Bachelor of Arts in Political Science with Distinction, *cum laude*, from Creighton University and his Doctor of Jurisprudence (J.D.) from William Mitchell College of Law. Brandon is a member of the National and Minnesota Public Employer Labor Relations Associations, SHRM, and MSBA–Labor and Employment Law Section.

Work Experience

FLAHERTY & HOOD, P.A.

St. Paul, Minnesota

Shareholder and Associate and Senior Attorney

Responsibilities include providing consultation, legal representation, and administrative agency representation for municipal clients before the District Court and state agencies, including the Minnesota Bureau of Mediation Services and Office of Administrative Hearings.

HONORABLE RENEE L. WORKE

Waseca, Minnesota

Judicial Clerk

Researched, consulted, and wrote orders and memorandums for Chief Judge and other Third Judicial District judges in south central Minnesota. Ran conciliation court settlement conference hearings and facilitated settlement agreements.

Education

William Mitchell College of Law

St. Paul, Minnesota

Juris Doctor

Creighton University

Omaha, Nebraska

B.A., Political Science with Distinction, *cum laude*

Bar Admissions

Minnesota

Honors and Awards

2013 and 2014 Super Lawyers-Rising Stars

Professional Associations

National and Minnesota Public Employer Labor Relations Associations

Society for Human Resources Management

Labor and Employment Law, Public Law and Administrative Law Sections of the Minnesota State Bar Association



Ethan Rundquist is a Data Analyst with the law firm of **FLAHERTY & HOOD, P.A.** Ethan compiles, analyzes, and communicates data for job analysis, job evaluation, market surveys, compensation, pay equity, and organizational structures. Ethan has a Bachelor of Arts Degree in Finance and Management from The College of Saint Scholastica. He is a member of the Society for Human Resources Management, Twin Cities Compensation Network, and World at Work Compensation Institute.

Work Experience

FLAHERTY & HOOD, P.A.

St. Paul, Minnesota

Data Analyst

Compiles, analyzes, and communicates data for job analysis, job evaluation, market surveys, compensation, pay equity, and organizational structures.

FRANSEN BANK AND TRUST

Arden Hills, Minnesota

Records Management Specialist

Entered data and prepared documents, spreadsheets, reports, and other materials; updated indexes and file data for legal and official documents; set up, optimized and enforced consistent document management policies; maintained files and retrieved information from computer and manual filing systems; and filled out and stored transmittal logs for permanent records.

THE COLLEGE OF ST. SCHOLASTICA

Duluth, Minnesota

REIF Economic Research Project

Collected information from business confidence surveys of businesses in the Duluth community; compiled data in Excel for REIF/regional economic forum; and presented via PowerPoint presentation.

Education

The College of Saint Scholastica

Duluth, Minnesota

Bachelor of Arts Degree in Finance and Management

Certifications

Google Data Analytics

Microsoft Excel Training

Professional Associations

Twin Cities Compensation Network

World at Work Compensation Institute Minnesota

Society for Human Resources Management

STATEMENT OF METHODS AND PROCEDURES

Organizational Structures and Classification Systems

Flaherty & Hood fully understands the complexities public sector entities need to be aware of and address in their organizational structures and classification system. Flaherty & Hood, P.A. approaches related studies in an objective, methodical, and customized manner.

Organization

To ensure that a local government is set up to provide high-quality, efficient and cost-effective services to their constituents, it needs to review the services it provides, the functions of city employees necessary to provide the services, its organization and reporting structures, its job classifications and the amount of staffing needed, the workplace environment, and how these items compare to comparable communities and any appropriate changes to make to its organization. An organizational analysis reviews each of these items.

Job Classification

Job classification involves the systematic study of jobs to determine which activities and responsibilities they include, the personal qualifications necessary for performance of the jobs, the conditions under which the work is performed, and each job's relative importance and worth to other jobs internally and externally. Flaherty & Hood developed and utilizes its own job analysis questionnaires and Flaherty & Hood Job Evaluation System for job classification purposes which consistently and equitably measure the skill, effort, responsibility, and working conditions required of each job class.

Communication

Given our extensive experience with serving local government entities, we understand the importance of open and honest communication with management and staff regarding organizational and classification issues and will maintain the highest degree of professionalism while working with these groups. Flaherty & Hood will continually consult with management throughout each stage of studying the organizational structure and classification system.

Management

We encourage management to give input and ask questions throughout the process. At each step of the process, we will provide the City of Breezy Point with draft documents, recommendations, and alternative actions to address the respective step, considering feedback from the City and best practices. After each step of the process is completed, management will be asked to approve the step before moving to the next step. We find this leads to a better incorporation of the organization's philosophy. Flaherty & Hood will work with management to ensure that all classification and compensation system projects are completed at the highest quality and in a timely and cost-effective manner.

Employees and Employee Groups Involvement

Flaherty & Hood, P.A. has a great deal of experience working with public sector workplaces, including those with employee rights to be unionized and/or meeting and conferring on terms and conditions of employment. We allow all parties to have a say in the organizational and

classification process while following all applicable laws related to cooperating with unions and employees.

We can engage employees in the study through:

- Holding “launch” meetings with employees and bargaining units and/or drafting for them an explanation of the study at the start or conclusion of a study so they can become informed of the system and ask any questions.
- Having a representative number of employees (both union and non-union) from each job class complete one of our thorough Job Analysis Questionnaires and/or provide feedback on the accuracy and completeness of their job descriptions. By having employees participate in this manner, we ensure the most accurate data is obtained.
- Providing management with responses to Frequently Asked Questions (FAQs) to use in responding to questions from employees and unions during the process.
- Soliciting feedback through organizational questionnaires from management on the organizational structure for their respective area of the city.
- Establishing a working group that includes organization management, employees, and bargaining units to provide feedback on the system and/or recommendations for job descriptions, job evaluation points, market entities, and/or compensation structure.
- Developing a process for employees to request a review of their position’s job description, job evaluations points and/or placement in the compensation structure if the dispute such components.

Flaherty & Hood, P.A. will draft the following communication to management:

- Timeline outline
- Forms
- Execution guide for organization management to related communications
- Notification for employees
- Template responses for organization management

WORK PLAN

Flaherty & Hood, P.A.'s Organizational Assessment services for the City of Breezy Point will include the following services. Text in **bold** are deliverables.

Phase	Services	Timeline after Start
A.	<p><u>Introduction and Project Orientation</u></p> <ul style="list-style-type: none"> • Review the City of Breezy Point's current organizational structure and classification system, which includes: <ul style="list-style-type: none"> ○ Classification and organizational-related policies and plans and labor contracts ○ Job descriptions ○ Job evaluation system and ratings ○ Organizational chart ○ Compensation and structure ○ Pay equity reports • Draft communication to incumbent employees and bargaining units explaining the Organizational Assessment, execution guides and responses to FAQs for the City of Breezy Point's management 	0-4 Weeks
B.	<p><u>Position Analysis</u></p> <ul style="list-style-type: none"> • Draft and distribute job questionnaires to specified incumbent employees addressing the skill, effort, responsibility, and working conditions of the job • Management reviews and comments on completed questionnaires • Review and analyze completed questionnaires and management comments 	4-8 Weeks
C.	<p><u>Organizational Analysis</u></p> <ul style="list-style-type: none"> • Review the following related to each division's organization <ul style="list-style-type: none"> ○ Mission, nature, and purpose ○ Organization and reporting structures ○ Services provided and functions performed ○ Alignment of services and functions with mission, nature and purpose ○ Positions necessary to provide services and perform functions ○ Amount of staffing ○ Succession plan • Organizational Questionnaires <ul style="list-style-type: none"> ○ Draft and distribute organizational questionnaires to management related to items in review above ○ Review and analyze completed questionnaires 	4-10 Weeks

Phase	Services	Timeline after Start
D.	<p><u>Updates to Job Descriptions</u></p> <ul style="list-style-type: none"> • Evaluate existing job descriptions to ensure they are current, accurate, and complete and provide written evaluation to management • Draft a uniform job description template and Job Description Drafting Guide • Analyze current job descriptions to ensure compliance with Federal and State regulations pertaining to compensation standards, including but not limited to Americans with Disabilities Act (ADA) and FLSA • Determine Fair Labor Standards Act exempt status of jobs • Draft updated job descriptions for jobs 	12-13 Weeks
E.	<p><u>Preparation of Final Documents and Updated Structure and System</u></p> <ul style="list-style-type: none"> • Prepare a final report describing the study results and implementation recommendations on all components of the organizational analysis specified in Phase C • Present on findings and recommendations, including written and/or oral reports to the City of Breezy Point City Council • Draft <ul style="list-style-type: none"> ○ Proposed organizational structure ○ Classification and organizational policy(ies) updates 	10-13 Weeks
F.	<p><u>Training on System Maintenance and Updating</u></p> <ul style="list-style-type: none"> • Conduct training for the City of Breezy Point’s management on maintaining and updating the organizational structure and job descriptions by utilizing how-to guides and electronic spreadsheets 	Post-Study

COST OF SERVICES

Base Services

Flaherty & Hood, P.A.'s will be not-to-exceed total lump sum cost of \$11,000

Flaherty & Hood, P.A. proposes to bill the City of Breezy Point for 1/3 of the base services of the lump sum cost up-front, 1/3 6 weeks after start of study based on satisfactory progress, and 1/3 upon completion of the services.

Other City-Wide Services

Additional Services for Assessment

Service	Total Cost
Prepare PowerPoint and present to incumbent employees explaining the assessment	\$750
Interview using organizational and position questionnaires for incumbent employees addressing the skill, effort, responsibility, and working conditions of their position	\$4,000 (maximum - billed hourly)
<p><u>Job Classification Evaluation</u></p> <ul style="list-style-type: none"> • Review current process used to evaluate skill, effort, responsibility, working conditions, and other relevant work-related data for each job • General <ul style="list-style-type: none"> ○ Using City's current job evaluation system or Flaherty & Hood's Job Evaluation System: <ul style="list-style-type: none"> ▪ Define uniform compensable factors and subfactors ▪ Establish points for factors and subfactors • Job specific <ul style="list-style-type: none"> ○ Establish and draft spreadsheet in Excel that systematically and objectively assigns points for each job using factors and subfactors • Management reviews, comments, and makes any necessary changes on job evaluation system and job specific points 	\$2,000
<p><u>Market Survey</u></p> <ul style="list-style-type: none"> • Establish market entities and sources based on statistical analysis and Market Selection Questionnaire submitted to the City of Breezy Point • Compile, review and analyze market organization or classification data • Draft market comparison data spreadsheets in Excel and discuss with the City of Breezy Point's management 	\$5,000

Service	Total Cost
<p><u>Classification and Compensation System Structure</u></p> <ul style="list-style-type: none"> Utilizing statistical analysis and Base Pay Development Questionnaire submitted to and completed by the City of Breezy Point, analyze internal job evaluation points compared to external market survey data to develop basis on which to update or build pay structure Draft proposed modifications to pay structure and schedule that include pay ranges based on job points Draft other proposed Total Rewards recognizing longevity Draft analysis of City-wide cost and individual employee wage impact of the proposed pay structure in Excel 	\$2,500
Draft process, forms, execution guide, and template responses for job evaluation point reviews requested by employees. Advise on handling specific requested reviews.	\$1,000
Establish supplemental variable pay system, such as performance pay, merit pay, and/or skills or competency pay	\$2,500
Compile, review, and analyze additional market compensation data	\$750 per category

Additional Job Classifications or Same Job Classifications after Assessment is Complete

Service	Total Cost
Draft, review, and analyze position questionnaires for incumbent employee, if any, and management addressing the skill, effort, responsibility, and working conditions of the position; draft new or updated job description; and establish internal rating after initial job classification rated	\$800
Establish points and provide analysis after initial job classification pointed	\$350
Compile, review, and analyze market compensation data, including wages, wage structure, and health insurance benefits	\$800
Compile, review, and analyze market compensation data other than wages, wage structure, and health insurance contributions	\$650 per category

Fees and expenses incurred by Flaherty & Hood, P.A. in providing all services to the City of Breezy Point will be billed as incurred on a monthly basis. Items in addition to those above or other labor relations, employment law, and human resources services are available to the City of Breezy Point and will be billed at the hourly rates of \$225 per hour for attorney, \$180 per hour for human resource analyst, and \$95 per hour for data analyst and administrative assistant; ½ of these rates for travel time; hard copy costs at \$.25 per page; and actual expenses for travel.

CLIENTS

Flaherty & Hood, P.A. has performed, or is currently performing, organizational and classification services for public entities that follow (in alphabetical order):

- City of Albert Lea
 - City of Alexandria
 - City of Austin
 - Austin Utilities
 - City of Bagley
 - City of Barnesville
 - City of Blue Earth
 - City of Brainerd
 - City of Detroit Lakes
 - City of Dilworth
 - City of Goodview
 - City of Hudson (WI)
 - City of International Falls
 - City of La Crescent
 - City of Lake Shore
 - City of Lewiston
 - City of Little Falls
 - Village of Los Lunas (NM)
 - City of Melrose
 - Minnesota Valley Transit Authority
 - City of Moorhead
 - Moorhead Public Service
 - City of Oakdale
 - City of Park Rapids
 - City of Pelican Rapids
 - City of Perham
 - City of Plainview
 - City of Princeton
 - City of Pueblo (CO)
 - City of St. Charles
 - St. Cloud Area Planning Organization
 - City of St. Joseph
 - City of Stillwater
 - City of Two Harbors
 - City of Wadena
 - City of Waseca
 - Washington County Development Agency
 - City of Wells
 - City of Windom
 - City of Winona
 - City of Winsted
 - City of Worthington
-