A Proposal to Conduct an HR, Classification and Compensation Plans Study for the City of Madeira Beach, FL

ORIGINAL

Evergreen Solutions, LLC

February 9, 2024

Response to Request for Proposal

Evergreen Solutions is well qualified to conduct a HR, Classification and Compensation Plans Study for the City of Madeira Beach due to our experience in conducting more than 1,200 similar studies for local governments and other public sector organizations across the country, especially in the State of Florida. As required in the Request for Proposal (RFP #2024-01), we have limited our responses due to the page limitations for each section. We have attached the Drug Free Workplace Certification.

1. Experience and Qualifications

In this section, we provide you with our experience and qualifications for conducting the HR, Classification and Compensation Plans Study the City of Madeira Beach; a brief description of the firm; a list of cities we have conducted comprehensive classification and compensation studies for; a listing and bios of proposed staff; and references.

1.1 Description of Firm

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 employs 29 full- and nine part-time staff who provide a variety of human resources consulting work. Evergreen is located at 2528 Barrington Circle, Unit 201, Tallahassee, Florida. The authorized representative for Evergreen is Dr. Jeff Ling, President, who can be reached at (850) 383-0111 or via email at jeff@consultevergreen.com.

Evergreen's main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: classification and compensation studies; salary and benefits surveys; performance appraisal reviews; workload analyses; staffing studies; HR department reviews; disparity studies; efficiency studies; training assessments; and strategic planning.

Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes: full visibility into the entire organization through research and discovery; a spirit of partnership with staff and leadership; sound recommendations based on best practices and proven methods; and a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have: extensive experience in conducting HR, classification and compensation plan studies for local governments and other public sector organizations throughout the country, including Florida; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant Florida statutes and regulations as well as federal regulations; objectivity and flexibility due to the fact that we have no vested interests; and specialized analytical tools that we bring to the project.

1.2　　List of Cities

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 47 states throughout the country. Because Evergreen has conducted more than 1,200 projects that are similar in scope to the services being requested, we have identified in **Exhibit 1**, a list of some of our similar local government work performed in Florida.

Exhibit 1: Sample List of Florida Local Government Clients			
City of Alachua	City of Kissimmee	City of St. Petersburg	Martin County
City of Apalachicola	City of Lake City	City of Sunny Isles Beach	Miami-Dade County
City of Bartow	City of Largo	City of Sunrise	Miami Shores Village
City of Bunnell	City of Maitland	City of Sunrise	Monroe County
City of Bushnell	City of Marathon	City of Tallahassee	Okaloosa County
City of Cape Coral	City of Marco Island	City of Tamarac	Orange County
City of Clermont	City of Melbourne	City of Temple Terrace	Osceola County
City of Clearwater	City of Miramar	City of Titusville	Palm Beach County
City of Cooper City	City of Naples	City of Venice	Pinellas County
City of Coral Gables	City of New Smyrna Beach	City of West Melbourne	Santa Rosa County
City of Coral Springs	City of Niceville	City of Winter Park	Sarasota County
City of Dania Beach	City of North Lauderdale	City of Zephyrhills	Seminole County
City of Daytona Beach	City of North Miami Beach	Alachua County	St. Lucie County
City of Daytona Beach Shores	City of North Port	Bay County	Sumter County
City of Delray Beach	City of Oakland Park	Brevard County	Wakulla County
City of Deltona	City of Ocala	Charlotte County	Town of Belleair
City of Destin	City of Oldsmar	Citrus County	Town of Cutler Bay
City of Doral	City of Opa-Locka	Collier County	Town of Davie
City of Dunedin	City of Orange City	DeSoto County	Town of Hilliard
City of Fort Myers	City of Orlando	Escambia County	Town of Jupiter
City of Fort Walton Beach	City of Palm Bay	Flagler County	Town of Jupiter Island
City of Green Cove Springs	City of Palm Beach Gardens	Franklin County	Town of Lady Lake
City of Groveland	City of Panama City	Gulf County	Town of Lake Park
City of Haines City	City of Panama City Beach	Hardee County	Town of Longboat Key
City of Hallandale Beach	City of Parkland	Hernando County	Town of Medley
City of High Springs	City of Pensacola	Highlands County	Town of Palm Beach
City of Holly Hill	City of Plant City	Hillsborough County	Town of Ponce Inlet
City of Hollywood	City of Plantation	Jackson County	Town of Orange Park
City of Holmes Beach	City of Punta Gorda	Jefferson County	Town of Surfside
City of Homestead	City of Sarasota	Lake County	Village of Islamorada
City of Key West	City of Sebastian	Leon County	Village of North Palm Beach
City of Jacksonville	City of Sebring	Manatee County	Village of Palmetto Bay
City of Jacksonville Beach	City of Sopchoppy	Marion County	Village of Pinecrest

1.3　　Bios of Proposed Project Staff

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

Dr. Jeff Ling, CCP – Project Principal (will have contractual authority over the project). Dr. Ling is the President of Evergreen Solutions who has been with the firm since its inception in 2004. He is a Certified Compensation Consultant (CCP) with more than 25 years of 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 management, compensation, classification, and operational management. 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.

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

- **Compensation/Classification**– He developed the methodology and techniques for organizations to employ for successful data collection and implementation based on internal and external equity needs. He has been the Project Principal for numerous projects related to classification and/or compensation. **Note: He has served as the Project Principal or Project Director for more than 1,200 public sector projects related to Classification and/or Compensation, including more than 200 in the State of Florida.**

- **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. Some of the higher institutions he has provided these services to include, but are not limited to: Howard Community College, MD; Tarrant County College District, TX, Midwestern State University, TX; Morehead State University, KY; and Seminole State College, FL.

- **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.

Mr. Rob Williamson- Project Director (Will be the day-to-day contact for the City). 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, 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. Hey was a Keynote speaker for the Florida American Water Works Association for its Fall Conference Opening General Session in 2023.

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.

A sample of some of the public sector projects that Mr. Williamson has directed or been involved with include: a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; a Comprehensive Compensation Study for Keys Energy Services, FL; a Compensation Study for the Indian River County Property Appraiser's Office, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Classification and Compensation Study for DeSoto County, FL; a Compensation Study for the Lake Apopka Natural Gas District, FL; a Classification and Pay Plan Study for Peace River Manasota River Water Supply Authority, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Classification and Compensation Study for the City of Apalachicola, FL; a Compensation Study for the City of Naples, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of New Port Richey, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Bradenton, FL; a Compensation Study for the City of Plantation, FL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the Manatee County Sheriff's Office, FL; a Compensation Study for the Marion County Property Appraiser, FL; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for Barrow County, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Calhoun, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Compensation Study for the City of Duluth, GA; a Classification and Compensation Study for the City of Madison, AL; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for Auburn- Opelika Tourism, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Job Market Survey for New Braunfels Utilities, TX; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; a Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX; a Compensation and Benefits Study for the Middle Rio Grande Conservancy District, NM; a Compensation Study for the Metropolitan St. Louis Water District, MO; a Compensation Study and Analysis for McLean County, IL; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation Study for the City of Morristown, TN; a Compensation Study for the City of White House, TN; Classification and

Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Compensation Study for North Charleston Sewer District, SC; a Compensation Study for the Town of Central, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for Dare County, NC; a Classification and Compensation Study for Culpeper County, VA; and HR Market Study for Botetourt County, VA; a Comprehensive Total Compensation Study for Cumberland County, PA; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Compensation Study for the City of Portsmouth, NH; and a Classification and Total Compensation Review for the City of Manchester, NH.

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.

Ms. Branda Whurr, PHR, SHRM-CP– Project Consultant. Ms. Whurr, PHR, SHRM-CP, is a Consultant with Evergreen who has more than 15 years of human resource management experience. As a former HR Director in both Florida and North Carolina, she led an HR team with onboarding, payroll processing and day-to-day employee issues; administered leave and workers' compensation; worked with leadership on recruiting strategies and employee relations issues; coordinated open enrollment and other benefits programs; implemented policies and procedures to assist in the transformation of a small company approach to a larger, multi-location company; transitioned the HR Department into a paperless document storage system; developed and implemented a recruiting program; and led initiatives for a Wellness Program and Family Fun Day to increase employee engagement.

A sample of some of the public sector projects that Ms. Whurr has been involved with include; a Compensation Study for the City of Holmes Beach, FL; a Classification and Compensation Study for the Indian River County Property Appraiser's Office, FL; a Classification and Pay Plan Study for the Peace River Manasota Regional Water Supply Authority, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Okeechobee, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Comprehensive Compensation Study for Keys Energy Services, FL; Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation Study for the City of Naples, FL; a Classification and Compensation Study for DeSoto County, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the City of Panama City Beach, FL; a Classification and Compensation Study for the City of Oldsmar, FL; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Classification and Compensation Study for the City of Jackson, GA; a Compensation Study for the City of Duluth, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Johns Creek, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Hampton, GA; a Compensation Study for Cobb County-Marietta Water Authority, GA; a Classification and Compensation Study and Analysis for Clayton County Water Authority, GA; a Compensation Study for Douglasville-Douglas County Water and Sewer Authority, GA; a Classification and Compensation Study for the City of Vienna, GA; a Classification and Compensation Study for the City of Madison, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Moline, IL; a Compensation Study for the City of Morristown, TN; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Compensation

Study for the City of White House, TN; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Classification and Total Compensation Review for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Classification and Compensation Study for Culpeper County, VA; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for the City of Burlington, NC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Classification and Compensation Study for the City of Southport, NC; Classification and Compensation Study Services for Dillon County, SC; a Compensation and Classification Study for Greenwood County, SC; a Compensation Study for the North Charleston Sewer District, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; a Compensation Study for the City of Orangeburg, Department of Public Utilities, SC; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation Study for the City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the Town of Addison, TX; and a Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX.

Ms. Whurr has a Bachelor's of Science in Management Information Systems and possesses a Professional Human Resources certification (PHR) as well as a certification as a professional with SHRM.

Daniel Tejada– Project Consultant. Mr. Daniel Tejada is an Analyst with Evergreen. He has spent a significant amount of time working with Evergreen on analyzing client data and returning accurate and thorough recommendations.

Mr. Tejada's role spans the project life cycle, producing robust analyses and reporting for each project phase. His primary responsibilities include: Collecting human resources data, reviewing and analyzing market research, and returning results to better improve client recommendations.

A sample of some of public sector projects that Mr. Tejada has been involved with include: a Compensation Study for the City of Holmes Beach, FL; a Comprehensive Compensation Study for Keys Energy Services, FL; a Classification and Compensation Study for the Indian River County Property Appraiser's Office, FL; an Employee Classification and Compensation Survey for the Okeechobee Utility Authority, FL; a Compensation Study for the City of New Port Richey, FL; a Classification and Pay Plan Study for the Peace River Manasota Regional Water Supply Authority, FL; a Staffing Study for the City of Naples, FL; a Compensation Study for the City of Naples, FL; a Classification study for Panama City Beach, FL; a Compensation Study for the City of Okeechobee, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation and Classification Study for Citrus County, FL; a Classification and Compensation Study for the City of Wildwood, FL; a Classification and Compensation Study for the City of South Miami, FL; a Classification and Compensation Study for the City of Boynton Beach, FL; a Compensation and Classification Study for the South West Florida Water Management District; a Classification and Compensation Study for the City of Hampton, GA; a Classification Study for Cherokee County, GA; a Compensation Study for Spalding County, GA; a Compensation and Classification Study for City of Atlanta, GA; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for the City of Madison, AL; a Classification and Compensation Study for the City of Moline, IL; a Compensation and Classification Study for the City of Minneapolis Department of Public Works, MN; a Total Compensation Study for Genesee County, MI; a Job Classification and Compensation Study for the Town of Wethersfield, CT; a Compensation and Classification Study for the City of Manchester, NH; a Compensation Study for the City of Portsmouth, NH; a Compensation Study for the City of White House, TN; a Compensation Study for the City of Morristown, TN; a Classification and Compensation Study for the Town of Huntersville, NC; a Classification and Compensation Study for Ashe County, NC; a Classification and Compensation Study for the City of Southport, NC; a Classification and Compensation Study for the City of Burlington, NC; Classification and Compensation Study Services for Dillion County, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a

Compensation and Classification Study for Greenwood County, SC; a Compensation and Classification study for Darlington County, SC; Compensation/Benefits/Pay-Practices and Classification Study and Analysis for Upper Trinity Water District, TX; and a Classification and Compensation Study for Amarillo College, TX.

Mr. Tejada holds a Bachelor's degree in Psychology and a Bachelor's Degree in Criminology from Florida State University.

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

1.4 References

In this section, we have provided the following three references that we feel demonstrate our more recent experience as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

Classification and Compensation Study
City of Wildwood, Florida
Contact Information: Cassandra Smith, Assistant City Manager/CFO, 100 N. Main Street
Wildwood, Florida 34785, (352) 661 – 6106, csmith@wildwood-fl.gov

Compensation and Classification Study
City of Oldsmar, Florida
Contact information: Michelle Kutch, PHR, SHRM-CP, Human Resources Director, 100 State Street West Oldsmar, Florida 34677-3655, (813) 749 – 1110, MKutch@myoldsmar.com

Classification and Compensation Study
City of New Port Richey, Florida
Contact Information: Ms. Bernie Wharran, SHRM-CP, Human Resources/Risk Manager, 5919 Main Street, New Port Richey, FL 34652, (727) 853 – 1026, WharranB@cityofnewportrichey.org

2. Approach/Methods Used to Perform the Project

In this section, we provide you with our understanding of the services to be provided, our approach and methodology for conducting the HR, Classification and Compensation Plans Study for the City of Madeira Beach; a detailed work plan─ identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of services of the Request for Proposal (RFP); and a proposed timeline.

2.1 Understanding of the Services to be Provided

Evergreen understands that according to the scope of services of the Request for Proposal, the City desires the following tasks to be performed:

- *review and evaluate Human Resources/Personnel processes relative to all City job classifications and compensation;*

- *review and evaluate all current job classifications to ensure compliance with federal, state, and local laws and regulations including the Fair Labor Standards Act, exempt/non-exempt classifications, and all other applicable personnel provisions;*

- *review all current job classifications, confirm, and recommend changes to hierarchical order of jobs using your evaluation system;*

- *establish appropriate benchmarking standards and conduct salary surveys as needed for similar positions as required (prefer to assess duplicate benchmarks – both municipalities as well as local employers);*

- *identify potential pay compression issues and provide potential solutions; and*

- *analyze and recommend changes to the present compensation matrix and/or structure to meet the market analysis.*

2.2 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a HR, Classification and Compensation Plans Study for the City of Madeira Beach as our team includes recognized experts in local government human resources management and understands that there is not a "one size fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Specifically, we have developed a implementation strategy that: focuses on market competitiveness; based on the organization's compensation philosophy; recognizes that compensation is comprised of more than base pay levels; reflects changes in recent compensation strategies; designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that based meet your overall needs; and produced a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that included both public and private sector employees.

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

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management. Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation

management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

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

2.3   Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the HR, Classification, and Comprehensive Plans Study for the City of Madeira Beach is provided in this section. Evergreen understands that the City has approximately 83 employees representing 59 classifications that will be included in the study.

Our work plan consists of the following 11 work tasks:

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

Task 1.0 - Project Initiation

TASK GOALS: Finalize the project plan with the City; gather all pertinent data; finalize any remaining contractual negotiations; and establish an agreeable final timeline for all project milestones and deliverables.

TASK ACTIVITIES

1.1   Discuss with City's Project Manager (CPM) and any other key personnel the following objectives: the classification and pay plan study processes; understand mission and current compensation philosophy; 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 what type of pay plan will reinforce current and future goals.

1.3   Obtain relevant materials from the City including: any previous projects, research, evaluations, or other studies that may be relevant to this project; organizational charts for the department and divisions, along with related responsibility descriptions; current position and classification descriptions; salary schedule(s), and classification systems; and personnel policies and procedures, including step placement policies.

1.4   Review and edit the project work plan and submit a timeline for the completion of each project task.

1.5   Provide frequent updates to the CPM throughout the study.

KEY PROJECT MILESTONES: Comprehensive project management plan and database of City staff.

Task 2.0 – Evaluate the Current System

TASK GOAL: Conduct a comprehensive preliminary evaluation of the existing compensation plan for the City.

TASK ACTIVITIES

2.1   Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.

2.2   Determine the strengths and weaknesses of the current pay plan(s) and structure for the City. Identify potential pay compression issues and provide potential solutions.

2.3   Review and evaluate HR personnel processes relative to all City classifications.

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

KEY PROJECT MILESTONES: Review of existing compensation plan(s); pay compression issues and solutions; and assessment of current conditions.

Task 3.0: Collect and Review Current Environment Data

TASK GOALS: Conduct statistical and anecdotal research into the current environment within the City and guide subsequent analytical tasks.

TASK ACTIVITIES

3.1   Schedule and conduct employee orientation sessions to describe the scope of work and methodology.

3.2   Interview department heads to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.

3.3   Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.

3.4   Work with CPM and Human Resources to administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT). Our staff utilizes a web-based tool for data collection. Paper copies can be provided for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.

3.5   Review any data provided by the City that may provide additional relevant insight.

KEY PROJECT MILESTONES: Job assessment tool distribution; department head interviews; and employee focus groups and orientation sessions

Task 4.0: Evaluate and Build Projected Classification Plan and Make FLSA Determinations

TASK GOALS: Identify the classification of existing positions utilizing the approved method for job evaluation and characterize internal equity relationships within the City.

TASK ACTIVITIES

4.1   Ensure that all draft class specifications are provided to Evergreen by the CPM.

4.2   Review the work performed by each classification and score based on job evaluation. Include an evaluation of supervisory comments.

4.3   Review job evaluation scores and identify the classification of positions.

4.4   Schedule and conduct any additional follow-ups with employees for jobs where uncertainty exists over data obtained from job evaluation.

4.5   Develop preliminary recommendations for the classification structure and discuss with the CPM The classification system designed at this point would be based solely on internal equity relationships and would be guided by the job evaluation scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.

4.6   Develop recommendations of FLSA (exemption) status based on results of the job evaluation (JAT) review and federal requirements.

4.7   Identify career ladders/promotional opportunities as deemed appropriate.

4.8   Review all recommendations with the CPM.

KEY PROJECT MILESTONES: Job evaluation scores by class; recommended classification changes; recommended FLSA status; and preliminary job structure based on internal equity

Task 5.0 - Identify List of Market Survey Benchmarks and Approved List of Targets

TASK GOALS: Reach an appropriate number and identify the proper benchmark positions for the external labor market salary and benefits assessment and identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary and benefits.

TASK ACTIVITIES

5.1   Identify, from the initial review; a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will use all 59 classifications as benchmarks for the salary survey.

5.2   Finalize list of benchmarks with the CPM.

5.3   For each employee group review with the CPM peer organizations to use as targets for the salary and benefits survey. **Note:** Evergreen will work with the CPM to select up to 20 targets for the salary and benefits survey.

5.4   Develop a preliminary list of public and private organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as: size of organization; geographic proximity to Madeira Beach; economic and budget characteristics; and other demographic data.

5.5   Develop a list of survey targets by employee group. Develop a system for use of private sector secondary data including the potential sources and weighting of secondary data, if necessary.

5.6   Review survey methodology with the CPM and refine survey methodology prior to distribution of surveys.

5.7   After approval of survey methodology, develop contact list of peer organizations and notify peers of impending surveys.

KEY PROJECT MILESTONES: Final list of benchmark positions for the external labor market assessment; initial list of survey peers; survey methodology; and final list of survey organizations and contacts

Task 6.0 – Conduct Market Salary and Benefits Survey and Provide External Assessment Summary

TASK GOALS: Conduct the external labor market salary survey; conduct a benefits survey; and provide a summary of market salary and benefits survey results to the CPM.

TASK ACTIVITIES

6.1   Prepare a customized external labor market salary survey for the CPM's approval. Discuss with the CPM questions and categories for the market survey.

6.2   Develop a listing of the current benefits provided by the City for comparisons with peer organizations.

6.3   Using the list of City provided benefits and major benefits offerings not provided by the City develop a list of benefits to include in the external labor market survey.

6.4   Prepare benefits survey to be included with salary survey developed in **Task 6.1**.

6.5   Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.

6.6   Conduct necessary follow-up through e-mails, faxes, and phone calls.

6.7   Collect and enter survey results into Evergreen's electronic data analysis tools.

6.8   Validate all data submitted.

6.9   Develop summary report of external labor market salary and benefits assessment results.

6.10   Submit summary report of external labor market salary and benefits assessment results to the CPM.

KEY PROJECT MILESTONES: Market salary survey instrument; benefits survey instrument; and summary report of external labor market salary and benefits assessment results

Task 7.0 – Develop Strategic Positioning Recommendations

TASK GOALS: Assess the appropriateness of the current compensation philosophy for the City and develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

7.1   Identify the compensation philosophy and accompanying thresholds.

7.2   Using the market salary data collected in **Task 6.0** and the classification data reviewed in **Task 4.0**, recommend the appropriate pay plan(s) for employees of the City.

7.3   Produce a pay plan for the City that meets its needs from an internal and external equity standpoint.

KEY PROJECT MILESTONES: Proposed compensation strategic direction, taking into account external equity and plan for addressing unique, highly competitive positions

Task 8.0 – Conduct Solution Analysis

TASK GOALS: Conduct analysis comparing job evaluation values; survey results for the benchmark positions; produce several possible options for implementation.

TASK ACTIVITIES

8.1   Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed plan for the City .

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

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

8.4   Meet with the CPM to discuss the potential solutions.

8.5   Determine the best solution to meet the needs of the City in the short-term and long-term.

8.6   Document the accepted solution.

KEY PROJECT MILESTONES: Initial market analysis; potential solutions; and documented final solution

Task 9.0 – Develop and Submit Draft and Final Reports

TASK GOALS: Develop and submit a draft and final report of the HR, Classification and Compensation Plans Study to the City of Madeira Beach and present the final report.

TASK ACTIVITIES

9.1   Produce a comprehensive draft report that captures the results of each previous step, including a complete listing of the allocation of job classes to salary range requirements. Provide the CPM with a draft final report for review that will include all costs associated with all recommendations as well as implementation strategies.

9.2   Make edits and submit necessary copies of the final report to the CPM.

9.3   Present the Final Report.

9.4   Develop a communication plan for sharing study results with employees of the City.

9.5   Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES: Draft and final reports; final presentation; communication plan; and implementation and maintenance database

Task 10.0 – Develop Recommendations for Compensation Administration

TASK GOALS: Develop recommendations for continued administration by City staff to sustain the recommended compensation and classification system; conduct training.

TASK ACTIVITIES

10.1 Develop recommendations and guidelines for the continued administration and maintenance of the classification and compensation system by City staff, including recommendations and guidelines related to: how employees will move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their positions; the proper mix of pay and benefits; how often to adjust pay scaled and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.

10.2 Recommend recruitment/retention strategies, where appropriate.

10.3 Finalize recommendations.

10.4 Provide training and tools to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's *JobForce Manager* tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

KEY PROJECT MILESTONES: Recommendations for compensation administration; recommendations for recruitment/retention policies; and training of Evergreen's *JobForce Manager* Tool

Task 11.0 – Provide Revised Class Descriptions

TASK GOALS: Update existing class descriptions; create new class descriptions as needed, ensuring ADA, FLSA, EEO, etc. requirement satisfaction; and provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

TASK ACTIVITIES

11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.

11.2 Discuss any necessary changes to the class description format with the CPM.

11.3 Update classification descriptions based on data gathered from the job evaluation process and create new class descriptions based on Evergreen's proposed classification structure by leveraging data from the job evaluation process, if available.

11.4 Recommend a systematic, regular process for reviewing class descriptions.

KEY PROJECT MILESTONES: Updated class descriptions; new class descriptions, as needed; and recommendations for regular review of class descriptions

2.4   Proposed Timeline

Evergreen possesses the ability, staff, skills, and tools to conduct the HR, Classification, and Compensation Plans Study in approximately four months of the project start date and following the signing of the contract. This is based on a tentative start date of April 15, 2024, and a completion date of August 15, 2024.

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

Exhibit 2
Proposed Timeline

PROJECT TASKS	2024				
	APR	MAY	JUN	JUL	AUG
1.0: Project Initiation	■				
2.0: Evaluate the Current System		■			
3.0: Collect and Review Current Environment Data		■			
4.0: Evaluate and Build Projected Classification Plan and Make FLSA Determinations		■	■		
5.0: Identify List of Market Survey Benchmarks and Approved List of Targets			■		
6.0: Conduct Market Salary and Benefits Survey and Provide External Assessment Summary			■		
7.0: Develop Strategic Positioning Recommendations				■	
8.0: Conduct Solution Analysis					■
9.0: Develop and Submit Draft and Final Reports					■
10.0: Develop Recommendations for Compensation Administration					■
11.0: Provide Revised Class Descriptions				■	■

3.   Cost Proposal

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct an HR, Classification, and Compensation Plans Study for the City of Madeira Beach. We are committed to providing the highest quality consulting services to our client partners for a reasonable fee. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that fee savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in **Section 2.2** of our proposal is **$35,500**. 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 conduct the full study as most of the work can be performed virtually.

Our preferred invoicing schedule is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 25% - upon completion of Tasks 5 – 6
- 15% - upon completion of Tasks 7 – 10
- 10% - upon completion of Task 11

We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the City of Madeira Beach wishes to identify.

COMPLIANCE WITH ALL APPLICABLE LAWS

Respondents shall comply with all applicable local, state, and federal laws and codes.

ATTACHMENTS

Drug Free Workplace Certification CONSULTANT shall include a signed and completed Drug Free Workplace Certification, attached hereto as Exhibit B.

DRUG FREE WORKPLACE CERTIFICATION.

SWORN STATEMENT ON DRUG FREE WORKPLACES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

This sworn statement is submitted to the City of Madeira Beach by _Dr Jeff Ling_

[print individual's name and title]

President for _Evergreen Solutions_

[print name of entity submitting sworn statement]

whose business address is: _2529 Barrington Cir, Talla, Fl 32308_ and _____ (if applicable) its Federal Employer Identification Number (FEIN) is _)_ (If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement: _20-1833438_

I understand that no person or entity shall be awarded or receive a City contract for public improvements, procurement of goods or services (including professional services) or a City lease, franchise, concession, or management agreement, or shall receive a grant of City monies unless such person or entity has submitted a written certification to the City that it will provide a drug free workplace by:

Providing a written statement to each employee notifying such employee that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance as defined by §893.02(4), Florida Statutes, as the same may be amended from time to time, in the person's or entity's workplace is prohibited specifying the actions that will be taken against employees for violation of such prohibition. Such written statement shall inform employees about:

    (i)   the dangers of drug abuse in the workplace.
    (ii) the person's or entity's policy of maintaining a drug-free environment at all its workplaces, including but not limited to all locations where employees perform any task relating to any portion of such contract, business transaction or grant.
    (iii) any available drug counseling, rehabilitation, and employee assistance programs; and

(iv) the penalties that may be imposed upon employees for drug abuse violations.

(2)   Requiring the employee to sign a copy of such written statement to acknowledge his or her receipt of same and advice as to the specifics of such policy. Such person or entity shall retain the statements signed by its employees. Such person or entity shall also post in a prominent place at all of its workplaces a written statement of its policy containing the foregoing elements (i) through (iv).

(3)   Notifying the employee in the statement required by subsection (1) that as a condition of employment the employee will:

    (i)   abide by the terms of the statement; and

    (ii) notify the employer of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such a conviction.

(4)   Notifying the City within ten (10) days after receiving notice under subsection (3) from an employee or otherwise receiving actual notice of such conviction.

(5)   Imposing appropriate personnel action against such employee up to and including termination; or requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state, or local health, law enforcement, or other appropriate agency.

(6)   Making a good faith effort to continue to maintain a drug free workplace through implementation of sections

(1) through (5) stated above.

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MADEIRA BEACH IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT ANY CONTRACT OR BUSINESS TRANSACTION SHALL PROVIDE FOR SUSPENSION OF PAYMENTS, OR TERMINATION, OR BOTH, IF THE CITY DETERMINES THAT:

(1)   Such person or entity has made false certification.

(2)   Such person or entity violates such certification by failing to carry out the requirements of sections (1), (2), (3), (4), (5), or (6) or subsection 3-101(7)(B); or

(3)   Such a number of employees of such person or entity have been convicted of violations occurring in the workplace as to indicate that such person or entity has failed to make a good faith effort to provide a drug free workplace as required by subsection 3-101(7)(B).

Signatory Requirement. In the case of a corporation, this affidavit shall be executed by the corporate president. In the case of a partnership, this affidavit shall be executed by the general partner(s). In the case of a business entity other than a partnership or a corporation, this affidavit shall be executed by an authorized agent of the entity or the individual.

Signature: _____
Title: _President_
Company: _Evergreen Solutions_

NOTARY PUBLIC

STATE OF FLORIDA

CITY OF ___Tallahassee___

Sworn to and subscribed before me this 8th day of ___Feb___, 2024.

by ___Dr. Jeff Ling___ who

is personally known to me   OR Produced identification

_____ [type of

identification] My commission expires ___10/23/27___

Notary Public State of Florida
Jacqueline Barnes
My Commission HH 418038
Expires 10/23/2027

Notary Public Signature
[Print, type or stamp Commissioned name of Notary Public]

Requests for Additional Information

Questions or requests for additional information should be directed to the City Manager, Robin Gomez at rgomez@madeirabeachfl.gov.

Signature of Proposer's Agent   Title _President_

_____

Printed Name   Date _2/8/2024_
Dr. Jeff Ling,

City of Madeira Beach
RFP 24-01