

Bolton

Benefits, Actuarial, Investment & Compensation Consulting

RFP #2024-01 HR, Classification, and Compensation Plans Study

Proposed Consulting Services

February 8, 2024

For Bolton:

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I. Introduction

Background

The City of Madeira Beach (Madeira Beach) is a city in Pinellas County, Florida, United States, bordered on the west by the Gulf of Mexico, and on the east by St. Petersburg. Madeira Beach, a Gulf Coast barrier island community, provides exceptional services to our residents, businesses, and visitors in a manner consistent with the eclectic nature of the city. The City of Madeira Beach is a commission-manager form of government. The Board of Commissioners (BOC) have legislative power of the city that includes adopting, amending, and repealing ordinances and resolutions, levying taxes, applying for and approving grants, renewing or extending franchises, and setting fees or user charges or municipal services. The BOC appoints the City Clerk, City Manager, City Attorney, and authorizes the City Manager to appoint the Finance Director/City Treasurer, and all serve at its pleasure. The City government provides services through approximately eight major departments.

Madeira Beach offers a full complement of total compensation programs designed to attract, retain and engage the type and caliber of staff required to provide services and meet the expectations of the community. Its human resources staff actively manage the total compensation program to ensure its alignment with City needs.

Madeira Beach is currently seeking proposals from qualified consultants to conduct a thorough and independent review of its classification and compensation program. As experts with specialized knowledge of public sector compensation systems in Florida and across the United States, Bolton was asked to submit this proposal describing our approach, planned team, and expected timing and fees to complete the desired study.

Objectives

The primary engagement objective is to review and, if needed, recommend changes to Madeira Beach's classification and compensation program. Based on our current understanding and expertise in organization development, classification, and compensation, meeting this objective will require the review of specific elements:

- Reward philosophy;
- Job documentation, descriptions, and evaluation;
- Market compensation benchmarking and analysis;
- Base pay structure(s) with grade and ranges;
- Job classification and grading; and
- Base pay delivery policies (market adjustments, merit adjustments, etc.).

II. About Bolton

Bolton Partners, Inc.

Bolton is a national full-service compensation, employee benefits, actuarial, and investment consulting firm with over 40 years of experience providing consulting services to clients in the public and corporate sectors, nonprofit organizations, as well as for the Federal Government. The firm was founded in 1981 by Mr. Robert G. Bolton, FSA, EA, MAAA, FCA, as an independent actuarial and employee benefits firm. Headquartered in Baltimore, Maryland, we also have offices in Colorado, New Jersey, Florida, Georgia, Ohio, Pennsylvania, and Virginia.

About Bolton Rewards

Bolton Rewards is the reward strategy and compensation consulting and services practice of Bolton. Our team of reward strategists, consultants and analysts provides services across a wide spectrum of total reward and compensation areas, including:

- Total Reward Strategy;
- Organization Performance and Design;
- Organizational communication;
- Classification and Compensation Programs;
- Performance Management; and
- Market Surveys and Research.

A Bit More on Selected Rewards Services

Organizational and Employee Performance

- We help agencies improve service delivery in a number of areas, including finance and purchasing, human resources, risk management, and records management.
- Our services include organizational assessments, staffing analysis, engagement surveys, performance management, compliance audits, process improvement, and strategic planning.

Top Executive Pay and Performance

- We provide board members and elected officials with a logical and straightforward path to making objective decisions and achieving results.

Pay Program Management Co-Sourcing

- Tailored to the needs of individual organizations, our services meet a variety of needs our clients encounter each year. We help with regular and ad hoc market benchmarking and competitive assessments, pay program management – structure adjustments and job evaluation/grading changes, and budget preparation.

Value Definition and Communication

- We help clients create, communicate and socialize their value proposition to current and potential employees so they can recruit top talent and build true engagement.
- Our reward strategy process identifies value-added factors, helps prioritize human resource investment, explains different components of the employment relationship, and helps align rewards and organization performance.

II. About Bolton

Bolton remains committed to helping our local and state government clients succeed for their communities. A full listing of our over 250 public sector clients is provided in the [Appendix](#). We also have a long history working with Florida clients across our practices.

- Broward County, FL
- Clay County Government, FL
- Clay County Sheriff's Office, FL
- City of Boca Raton, FL
- City of Cape Coral, FL
- City of Cocoa, FL
- City of Doral, FL
- City of Dunedin, FL
- City of Flagler Beach, FL
- City of Fort Myers Shores, FL
- City of Hallandale Beach, FL
- City of Hialeah Gardens, FL
- City of Hollywood, FL
- City of Lake Mary, FL
- City of Lakeland, FL
- City of Miami, FL
- City of Melbourne, FL
- City of PSL Gardens, FL
- City of Port St. Lucie, FL
- City of Miramar, FL
- City of New Smyrna Beach, FL
- City of North Fort Myers, FL
- City of Orlando, FL
- City of Palm Beach Gardens, FL
- City of Pompano Beach, FL
- City of Riviera Beach, FL
- City of Sanford, FL
- City of Sarasota, FL
- City of West Palm Beach, FL
- City of Winter Park, FL
- Emerald Coast Utilities, FL
- Fort Myers Shore Fire, FL
- Highlands County, FL
- Jacksonville, FL Transportation Authority
- Lake Worth, FL Drainage District
- Manatee County, FL
- Monroe County, FL
- North Fort Myers, FL Fire District
- Orange County Sheriff's Office, FL
- Palm Harbor, FL Fire Rescue
- Santa Rosa County, FL
- Town of Cutler Bay, FL
- Town of Davie, FL
- Town of Juno Beach, FL
- Village of Royal Palm Beach, FL
- Washington County, FL

II. About Bolton

Selected References

Client	Project
City of Dunedin, Florida Theresa Smalling Director, Human Resources & Risk Mgt (727) 298-3042 tsmalling@dunedinfl.net	Reviewed and redesigned Dunedin's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Maitland, Florida Liberty Gondar Director Human Resources (407) 539-6255 lgondar@itsmymaitland.com	Reviewed and redesigned Maitland's job description, job evaluation, classification, and performance management plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Lakeland, Florida Mark Farrington Director Human Resources (863) 834-6866 mark.farrington@lakelandgov.net	Reviewed and redesigned Lakeland's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.
City of Winter Park, Florida Pam Russell Division Director, Human Resources (407) 559-3227 prussell@cityofwinterpark.org	Reviewed and redesigned Winter Park's job description, job evaluation, and classification plans. Conducted original market research of selected counties and municipalities and established new pay ranges, classification grading and effective pay management policies.

III. Project Approach – Preliminary Work Plan

Phase 1: Project Planning and Discovery

Step 1: Project Planning

- We will kick off the project with a meeting among the Madeira Beach and Bolton project teams to finalize engagement goals and scope and establish data needs, time milestones, and deliverables.
- Bolton will prepare data requests and assist with data collection, as needed, and will prepare a working project plan.

Step 2: Current Program Review

- Bolton will collect and internally review the organizational plan and policy documents, as well as previous assessments and analyses that describe the current compensation and benefits programs and their administration.
- We will meet with the HR team to ensure our full understanding of the current program.

Step 3: Communication Planning

- Should Madeira Beach desire assistance communicating the study within the organization, we will help develop a communication plan. Our communication plan will help define key messages, specific audiences, the best media to use, and appropriate timing and milestones.
- We will provide template memo text/talking points for employee communication and can conduct an electronic project briefing session that can be recorded for ongoing use. We also conduct on-site, in-person briefing sessions.

Step 4: Leadership Briefing

- Bolton will work to brief leadership - elected officials, executives, and department heads on the project and desired outcomes.
- We will also discuss the specific project steps, expected timing, and their role in helping the study succeed.

Step 5: Management Interviews

- We will interview department heads and other management to better understand the work, how it is organized, and intended job results, to learn more about special talent considerations and labor market challenges, and to gather perceptions of the current program's effectiveness.
- Prior to and in preparation for our interviews, we will work with Madeira Beach to request department heads complete our Departmental Functional Survey either online or via our tailored Microsoft Word form.

III. Project Approach – Preliminary Work Plan

Phase 2: Job Analysis and Evaluation

Step 1: Job Description Review

- We plan to work with Madeira Beach to collect existing job descriptions and review job content data (duties, responsibilities, and requirements) on all covered jobs.
- We will review both the format and the general language and text used within existing job descriptions. Our review will focus on several key areas:
 - Inconsistent use of compensable factor leveling terms;
 - Functions that are too task-based or are too numerous to be considered essential;
 - Overgeneralized job requirements; and
 - Inconsistency with PIFs, if PIFs are used.

Step 2: Job Title and System Review

- We also plan to review the use of job and position titles for internal consistency and market commonality.
- Typically, effective job titles have three components that are consistently applied:
 - Family or technical identification, such as Accounting, Construction, Equipment Maintenance, Planning, Recreation, or Water Treatment.
 - Name of the type of work completed, such as Analyst, Clerk, Coordinator, Manager, Engineer, Operator, Representative, Specialist, or Technician.
 - A designation for the level of work completed as part of a progression, if such a progression exists. The titles are sometimes indicated by numbers or letters or by specific labels, such as Associate, Entry, Staff, Senior, Principal, etc.

III. Project Approach – Preliminary Work Plan

Phase 2: Job Analysis and Evaluation (continued)

Step 3: Job Evaluation

- Job evaluation is a systematic approach to determining job value relative to other jobs for purposes of pay opportunity determination. Effective job evaluation systems:
 - Reflect organizational values;
 - Help rationalize and deliver internal equity;
 - Should be defined by legally-acceptable compensable factors – not competencies or performance-related behaviors; and
 - Align with the organization’s need to recruit and retain qualified staff.
- We will first organize jobs into our Career Stream families. A family is a group of jobs having the same nature of work but requiring different levels of skill, effort, responsibility, or working conditions. Families are the first grouping to establish progressions of skill, knowledge, and responsibility across jobs and are essential to ensuring organizational consistency and equity.
- Career Stream levels are clearly differentiated levels within a family. The levels for each family are defined in terms of a “whole job” approach (i.e., all job dimensions are evaluated in the aggregate rather than on an individual basis).
- Bolton will review the Madeira Beach’s current job evaluation system and job classification structure to assess its effectiveness in helping manage internal and external equity across the organization.

Step 5: FLSA and Other Legal Review

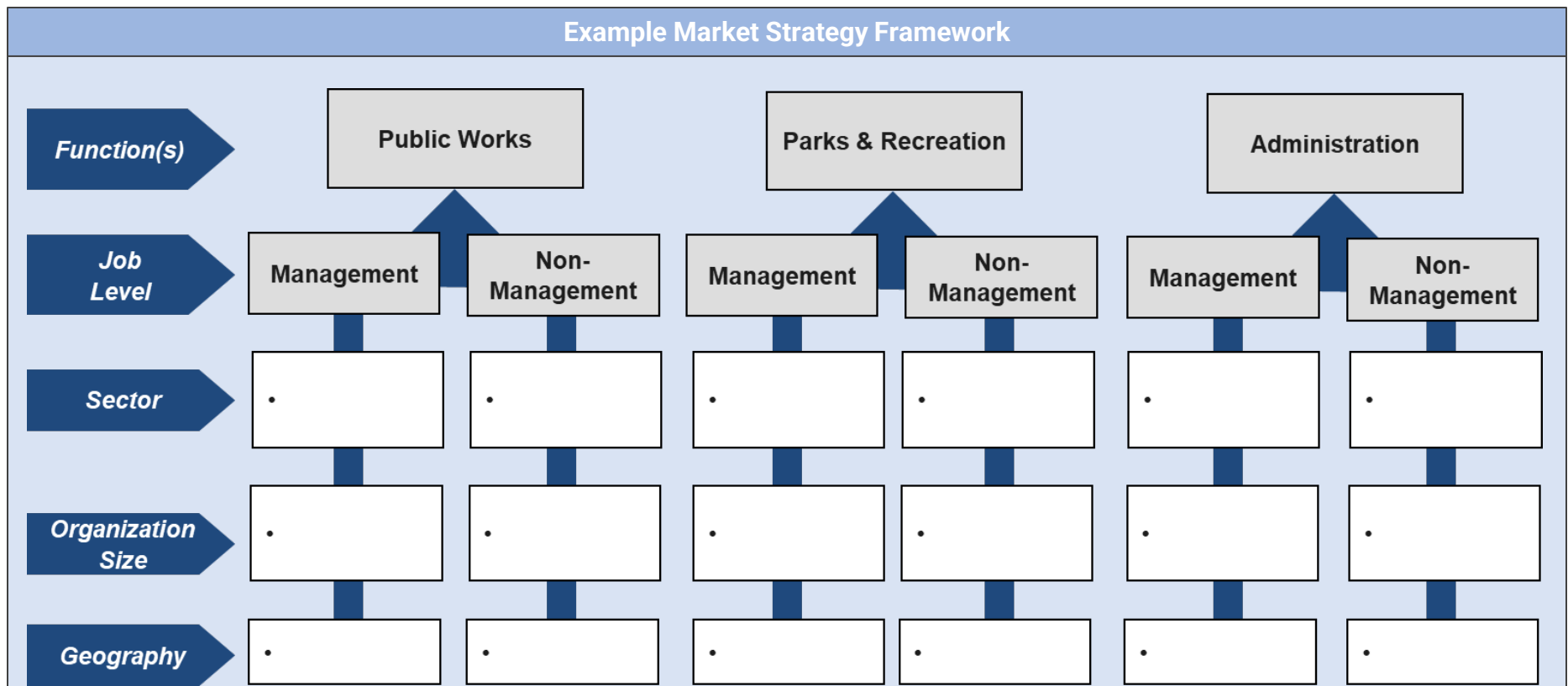
- Bolton will further review jobs to provide an opinion and guidance on classifications status with respect to the FLSA and EEO regulations.
- Specifically, we will apply Executive, Administrative, Professional, and or Computer exemption tests to determine exemption status on relevant jobs.
- In addition, we will assign jobs to one of the ten Employer Information Report EEO-1/4 Survey Categories.

III. Project Approach – Preliminary Work Plan

Phase 3: Market Benchmarking

Step 1: Market Strategy

- Collaborate with the Madeira Beach to finalize the competitive labor market(s) that aligns with the feedback received from leadership and management, including specific peer organizations.
- The market strategy will identify sectors – public sector employers as well as private sector employers – with whom Madeira Beach wants to compete for talent.
- It will also identify competitive differences based on the size of employers and their geographic location.



III. Project Approach – Preliminary Work Plan

Phase 3: Market Benchmarking (continued)

Step 2: Custom Survey/Original Research

- Using our TRDx platform, we will conduct a custom survey of total compensation levels and practices survey of identified peers.
- Guided by Madeira Beach’s market strategy, we anticipate researching cities and counties in the region as well as private employers, if appropriate.
- We will help define the most appropriate contacts at each peer and a communication plan designed to gain maximum participation.
- The custom survey will require the completion of several distinct tasks:
 - Identify benchmark job titles and descriptions for inclusion in a survey;
 - Prepare survey package for review and approval;
 - Make initial contact with potential participants to generate interest;
 - Electronically distribute the questionnaire to the invitee list and monitor survey returns and follow-up;
 - Collect and review returned surveys, following up with questions or verification of reported data;
 - Aggregate and summarize reported data for use in our analyses; and
 - Produce and distribute a summary report for participants.

Step 3: Published Survey Analysis

- In addition, Bolton maintains an extensive library of published surveys and research that covers a wide array of market sectors, geographies, and job types. Our CompManager database has over 500,000 records of base and total cash compensation data.
- We will incorporate these data into our analyses, if needed, to represent desired labor markets.
- The results of our survey and supplemental market research will be summarized and presented as part of our subsequent gap analysis.

III. Project Approach – Preliminary Work Plan

Phase 4: Program Review Recommendations

Step 1: Gap Analysis

- After our analysis of background data, the strategy discussions with senior leadership, and interviews with department heads, Bolton will assess if/where gaps may exist between the Madeira Beach's objectives and the design and/or administration of its compensation system.
- Bolton will develop a series of conceptual recommendations to discuss and develop an overarching approach to subsequent work steps as well as the program design backdrop.
- After discussion with the Madeira Beach team, we will then finalize our review findings and recommendations.

Step 2: Job Title and Documentation Recommendations

- We will provide our recommendations resulting from our job analysis to include system tools and job-by-job editorial comments.
- During this step, Bolton will recommend changes to the job description and other document formats as well as develop a job title system.
- We will provide our recommended edits to existing jobs, recommend new jobs to be created, and recommend job title revisions if needed.
- Job descriptions are finalized once all classification and compensation plan components are finalized approved so necessary elements can be included on the job descriptions.

Step 3: Structure and Classification Plan

- Bolton will employ the market data to develop base pay structures and ranges which are market competitive and aligned with Madeira Beach's compensation philosophy and objectives.
- We will integrate the job evaluation results with the market data to develop and implement a job classification system that aligns internal equity with market competitiveness.
- Our recommendations will include guidelines for future structure adjustments and how the adjustments impact employee pay.
- These guidelines will allow Madeira Beach to maintain its structures in a competitive position relative to the market over time.

III. Project Approach – Preliminary Work Plan

Phase 4: Program Review Recommendations (continued)

Step 4: Employee Pay Equity and Delivery Analysis

- Once the revised structure(s) is/are in place and jobs have been classified and assigned to grades, Bolton will assess the competitiveness and equity of actual employee pay.
- We will use compa-ratios, range penetration, or other market alignment measures to assess the overall competitive alignment of employees' actual pay.
- Working with Madeira Beach, we will also address wherein the pay range an employee should be paid relative to their performance over time in their specific job so that we can assess actual pay competitiveness and broader statistical trends or issues, such as career pay and pay compression.

Step 5: Base Pay Increase/Total Pay Delivery Plan

- Total pay plan design/policy recommendations that align how employee pay gets changed over time with what the organization values. Typical adjustments include merit increases or promotional increases and we will expand our recommendations to include:
 - Premium pay policies (e.g., Acting Pay; Extra Duty Pay; Shift Differential, etc.);
 - Position Changes - Reclassification Increase;
 - New hiring rates and salary offer guidelines;
 - Promotions (percentages and timing of pay changes); and
 - Demotions and voluntary reassignments.

Phase 5: Reporting and Implementation

Step 1: Draft Reporting, Costing and Planning

- We will prepare a comprehensive draft report of our methodology, review findings, and recommendations for discussion with Madeira Beach Administration and Human Resources.
- We will work with Madeira Beach to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.

Step 2: Final Reporting, Approval, and Policy Updates

- Based on discussions with Madeira Beach, we will incorporate agreed-upon changes and prepare a final report targeted for public disclosure.
- Should it be desired by the Madeira Beach, Bolton will present the study report or a summarized version to leadership and/or elected officials.

Step 3: Implementation and Communication

- We will also work with Madeira Beach to determine appropriate implementation approaches, including strategies for fixing any pay inequities that arise from the study, the new structures, and how jobs are graded.
- Major tasks we expect to complete include reviewing, editing, and finalizing policies; developing an implementation and communication plan for Madeira Beach use; working with HR to orient managers to the new systems; and transferring tools and resources to HR and provide training on their ongoing use.

IV. Planned Project Team

Dan Ripberger, Engagement Manager

With 30 years of experience, Dan has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Dan is particularly adept in:

- Change management counsel and direction – Dan is an astute advisor regarding the change management implications of organization-wide compensation projects and helps clients predict and prepare for the financial and employee relations effects of process decisions and plan change decisions.
- Integrating total rewards – an early contributor to the concept of total rewards, Dan helps clients rationalize the value of their total compensation programs (health benefits, paid time off, retirement, etc.) to help guide the design of pay programs and communicate the value proposition to employees and managers.
- Securing the support of elected and employee leadership – by demonstrating an understanding of the viewpoints of various stakeholders, Dan effectively communicates the purpose of plan changes and the benefit of changes to the organization.

Over his career, Dan has advised clients of most types and sizes and has developed specialized knowledge of the mission-focused and public sector markets. A sample of his public sector client assignments includes Ada OK, Albany GA, Baltimore County MD, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Laramie WY, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, University of North Carolina, US DoD Research and Engineering Labs, Wicomico County MD, Winter Park FL, and Wytheville VA. In addition, Dan has worked with such quasi-public sector organizations as DC Water & Sewer Authority, Municipal Securities Rulemaking Board, National Quality Forum, and Regional Income Tax Agency.

Dan began his consulting career with Towers Perrin and Aon/Radford Associates. He went on to help found PRM Consulting and managed the consulting practices for MPI Consulting. Dan joined Bolton as a result of their acquisition of RSC Advisory Group, a niche compensation and total rewards consulting he helped found in Washington, D.C., and the Midwest.

He earned a bachelor's degree with concentrations in Economics and Human Resources from Xavier University. He maintains professional certifications from both WorldatWork and the Society for Human Resource Management.

IV. Planned Project Team

Scott Schreiber

With 30 years of experience, Scott Schreiber has a long history of maintaining successful client relationships and providing sound and effective compensation advice. Along with his expertise in job architecture, classification, and compensation, Scott specializes in:

- Job Evaluation systems across a wide variety of organizations.
- Developing alternative approaches to Classification Systems, Point Factor plans, Scored Questionnaires, as well as Market-Based Job Evaluation.
- Tailoring Bolton's point factor job evaluation system to each client's needs.

A sample of Scott's public sector client assignments include Cincinnati METRO, County of Indianapolis, Green Township OH, Kenton County Airport Board, Marion County IN, Northern Kentucky Health Department, Takoma Park MD, Wor Wic Community College.

Previously, Scott served as the Midwest Compensation Practice Leader for Watson Wyatt. Prior to that, Scott was a Principal and Practice Leader for William M. Mercer's Inc.'s Reward and Talent Management practice, President of a small industrial manufacturer, Senior Vice President of Human Resources of a large insurance company, and several other corporate and consulting roles. Scott earned an MBA from Xavier University and a Bachelor of Arts from the University of Cincinnati.

Jennifer Durham, Senior Consultant

Jennifer Durham is a seasoned professional with over 20 years of collective total rewards and human resources management experience.

Her most recent experience includes market pricing and analysis, job classification, job evaluation, custom surveys, and structure development. Jennifer is the lead administrator for Bolton's market surveys, such as our TRDx client-specific surveys.

A sample of Jennifer's public sector client assignments includes Ada OK, Albany GA, Baltimore County MD, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Laramie WY, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, University of North Carolina, US DoD Research and Engineering Labs, Wicomico County MD, Winter Park FL, and Wytheville VA.

Prior to joining Bolton, Jennifer was a senior analyst with RSC Advisory Group with a focus on market pricing and analysis, custom survey administration, and executive compensation. Prior to consulting, she served as Director, Human Resources for Sekisui XenoTech.

She has a Bachelor's degree in both Accounting and Marketing from Kansas State University and holds senior professional certification through HRCI (SPHR).

IV. Planned Project Team

Danny Finkelstein, Senior Consultant

Danny Finkelstein is a seasoned analyst and project manager who works effectively with managers, executives, and individual contributors to make effective, efficient, data-based decisions and recommendations for Bolton's clients.

Prior to his current role, Danny was an Associate within Mercer's Human Capital group and a Senior Consultant and Project Manager within ORC Worldwide's Global Compensation and General Consulting groups, as well as providing project support to ORC's SIRS survey participants. He has over a dozen years of compensation consulting experience.

Danny has partnered with a wide variety of client organizations to tackle all natures of compensation and benefit issues ranging from market analysis and job pricing to salary structure design and implementation and performance management. The sectors he has touched on include life sciences (pharmaceutical, medical device, biotechnology), colleges and universities, the digital/graphic design space, the oil and gas industry, the financial/insurance sector, the non-profit sector, and numerous government agencies. This broad and varied sector experience has created deep expertise in market data sources and effectively leveraging the best available data for each unique client.

Danny has a Bachelor's degree from the University of Pennsylvania where he was a member of the varsity baseball team and a 3-year intern for Grant Thornton's Business Advisory Services group.

Sandra Bruce, Consultant

With over 30 years of experience in consulting and public sector human resources, Sandra Bruce is a Consultant with Bolton specializing in public sector job analysis and classification.

A sample of Sandra's public sector client assignments includes Albany GA, Clay County FL BCC, Clay County FL Sheriff, Dunedin FL, Fredericksburg VA, James City County VA, Lakeland FL, Maitland FL, Maryland Department of Legislative Services, Port St. Lucie FL, State of North Carolina, Takoma Park MD, Winter Park FL, and Wytheville VA.

Prior to her role at Bolton, Sandra served as a Senior Human Resources Consultant for the Georgia Department of Labor, focusing on classification and compensation reviews, COVID protocols, and strategic recruitment efforts. Prior to that, Sandra was the Human Resources Director for the Georgia Department of Defense, the state agency responsible for oversight and support of the Georgia Army and Air National Guard.

Sandra earned a Master of Public Administration from Georgia State University and a Bachelor of Arts in Political Science and English from LaGrange College. She has held her PHR certification since 2000.

V. Timing and Fees

Timing

We are prepared to begin immediately upon receiving formal approval to do so. We estimate it will take 10 to 14 weeks from the project's initiation to fully meet all staffing, classification, and compensation engagement objectives. This assumes that Madeira Beach schedules meetings and makes process approval decisions promptly and within the project timeframe. It also assumes that agencies from whom market data are requested do so within a reasonable timeframe so that data collected can be processed and employed in our market analysis.

Fees

We will charge an all-inclusive flat fee of \$34,300 to complete all objectives outlined in our proposal. This fee includes all labor, materials, travel-related expenses, and all related costs based on the defined project scope. We bill monthly as work tasks are completed.

Major pricing assumptions:

- The study will cover up to 100 employees in up to 60 unique job titles.
- We plan to work with leadership and HR to define a market strategy and develop and list of survey peers.
- We will utilize existing job descriptions to gather required job content data.
- We also will also interview department heads to address specific functional duties and positions.
- Market survey will cover pay and pay practices using Bolton's TRDx from up to 30 survey invitees.
- We will also develop rates at the 25th, 50th, and 75th percentiles from published data sources on as many jobs as possible.
- Our pricing is good for 120 days from the date of the proposal.

Our proposal and fees do not include a market comparison of Health, Welfare, PTO, retirement and other benefits, nor do they include the cost of updating job descriptions. Should Madeira Beach desire one or both of these services, the additional fee would be:

- \$8,000 for the total benefits market study.
- \$7,500 for job descriptions.

Bolton

Benefits, Actuarial, Investment & Compensation Consulting

RFP #2024-01 HR, Classification, and Compensation Plans Study

Proposed Consulting Services

February 8, 2024

Appendix



Appendix: Bolton Public Sector Clients

Anne Arundel Community College, MD
Anne Arundel County, MD Government
Anne Arundel County, MD Public Library
Baltimore County, MD Government
Baltimore County, MD Public Schools
Baltimore County, MD Revenue Authority
Bedford County, VA
Bedford County, VA Public Schools
Bedford Regional Water Authority
Broward County, FL
Buffalo, NY Public Schools
Calvert County, MD
Calvert County, MD Public Schools
Caroline County, MD Board of Education
Caroline County, MD Government
Caroline County, MD Public Schools
Carroll County Community College, MD
Carroll County, MD
Carroll County, MD Public Schools
Cattaraugus County, NY
Cecil County, MD Commissioners
Cecil County, MD Government
Cecil County, MD Public Schools
Charles County, MD Government
Charles County, MD Public Schools
Charles County, MD Sheriff's Office
Charlotte-Mecklenburg, NC Schools
Chatham County, GA
Cherokee County, GA
Chesapeake, VA Public Schools
Chicago Regional Transportation Authority
City of Ada, OK
City of Austin, TX
City of Albany, GA
City of Baltimore, MD
City of Boca Raton, FL
City of Bowie, MD
City of Cambridge, MD
City of Cape Coral, FL
City of Chesapeake, VA
City of Cocoa, FL
City of Doral, FL
City of Dover, DE
City of Dunedin, FL

City of El Paso, TX
City of Flagler Beach, FL
City of Fond du Lac, WI
City of Fort Myers Shores, FL
City of Frederick, MD
City of Fredericksburg, VA
City of Gaithersburg, MD
City of Greenbelt, MD
City of Griffin, GA
City of Hialeah Gardens, FL
City of Hollywood, FL
City of Hyattsville, MD
City of Lake Mary, FL
City of Lakeland, FL
City of Laramie, WY
City of Laurel, MD
City of Lexington, VA
City of Maitland, FL
City of Manassas, VA
City of Manassas, VA Public Schools
City of Melbourne, FL
City of Miami Gardens, FL
City of Middletown, OH
City of Miramar, FL
City of New Smyrna Beach, FL
City of New York, NY
City of Newark, DE
City of North Fort Myers, FL
City of Norwich, CT
City of Orlando, FL
City of Palm Beach Gardens, FL
City of Pittsburgh, PA
City of Plainfield, NJ
City of Pocomoke, MD
City of Pompano Beach, FL
City of Providence, RI
City of Reading, PA
City of Riviera Beach, FL
City of Rockville, MD
City of Salisbury, MD
City of Sanford, FL
City of Sarasota, FL
City of Takoma Park, MD
City of West Palm Beach, FL

City of Westminster, MD
City of Wilmington, DE
City of Winchester, VA
City of Winter Park, FL
Clay County Board of Commissioners, FL
Clay County Sheriff's Office, FL
Clay County, TX
Columbia County, FL
College of Southern Maryland
Colorado Department of Health Care
Community College of Baltimore County
County of Albemarle, VA
County of Culpeper, VA
County of Hawaii, HI
County of Lancaster, PA
Coweta County, GA
Culpeper County, VA Schools
Dawson County, GA School System
Delaware River & Bay Authority
Delaware Transit Corporation
Department of Justice
Dinwiddie County, VA
Dinwiddie County, VA School Board
District of Columbia Retirement Board
Dorchester County, MD
Dorchester County, MD Board of Education
Eastern Iowa Airport (CID)
Eastern Shore of Maryland
Emerald Coast, FL Utilities
Employees Retirement System of Texas
Fauquier County, VA
Florida Department of Financial Services
Fond du Lac County, WI
Fort Myers Shore Fire, FL
Frederick Community College, MD
Frederick County, MD Government
Frederick County, MD Public Schools
Frederick County, VA Government
Frederick County, VA Public Schools
Garrett County, MD Government
Garrett County, MD Public Schools
Gloucester County, VA
Hallandale Beach, FL
Hampton Roads, VA Sanitation

Appendix: Bolton Public Sector Clients

Hanover County, VA Government
Harford Community College, MD
Harford County, MD
Harford County, MD Public Library
Harford County, MD Public Schools
Harford County Sheriff's Office, MD
Hazleton City, PA Pension Board
Higher Ground Education
Highlands County, FL
Housing Authority of Baltimore City, MD
Howard Community College
Howard County, MD Government
Howard County, MD Library
Howard County, MD Public School System
Indian Trail Improvement District
Inter-University Council of Ohio
Ithaca City, NY School District
Jacksonville, FL Transportation Authority
James City County, VA
Kent County, MD Government
Kent County, MD Levy Court
Kent County, MD Public Schools
Kenton County Airport Board (CVG)
King George County & Schools, VA
King William County, VA
Lake Worth, FL Drainage District
Lehigh Acres, FL Fire Control
Loudoun County, VA Public Schools
Loudoun County, VA Sanitation Authority
Lower Merion Township, PA
Macon-Bibb County, GA
Manassas Park, VA City Schools
Manatee County, FL
Maryland Dept of Legislative Services
Maryland State Retirement Agency
Metropolitan Water Reclamation
Milwaukee County, WI
Monroe County, FL
Montgomery County, MD Council
Montgomery County, MD Government
Montgomery County, MD Public Schools
New Hampshire Public Employees
New Horizons Regional Education Center
New Jersey Transit Corporation

New Kent County, VA Public Schools
New York Power Authority
New York State Thruway
Newport News, VA Public Schools
Niagara Frontier Transportation Authority
Northampton County, PA
North Fort Myers, FL Fire District
Ocean County, NJ Utilities Authority
Oneida County, NY
Orange County, VA
Oswego City, NY School District
Palm Harbor, FL Fire Rescue
Pennsylvania State Education
Philadelphia, PA Parking Authority
Port LaBelle, FL
Postal Regulatory Commission
Prince George's Community College MD
Prince George's County, MD Government
Prince George's County, MD Schools
Prince William County, VA Schools
Prince William County, VA
Queen Anne's County, MD Board of Education
Queen Anne's County, MD Government
Queen Anne's County, MD Public Schools
Rappahannock County, VA
Rappahannock County, VA Public Schools
Regional Income Tax Agency
Roanoke County, VA
Roanoke County, VA Public Schools
Rockingham County, VA Government
Rockingham County, VA Public Schools
San Jose Police Officers Association, CA
San Luis Obispo County, CA Pension Trust
Santa Rosa County, FL
School District of Philadelphia, PA
Shenandoah Valley Juvenile Center
Somerset County, NJ Board of Education
South Central Wastewater
South Florida Conservancy District
Spotsylvania County, VA Government
Spotsylvania County, VA Public Schools
St. Lucie County, FL Fire District
St. Mary's County, MD Government
St. Mary's County, MD Library

St. Mary's County, MD Public Schools
St. Mary's County, MD Sheriff's Office
Stafford County, VA Government
Stafford County, VA Public Schools
State of Alaska
State of Maine
State of Maryland
State of Montana
State of Oregon
State of West Virginia
State of Wisconsin
Stevenson University
Suffolk County Community College, NY
Talbot County, MD
Talbot County, MD Board of Education
Thomas County, GA School District
Town of Centreville, MD
Town of Chestertown, MD
Town of Colmar Manor, MD
Town of Cutler Bay, FL
Town of Davie, FL
Town of Edison, NJ
Town of Elkton, MD
Town of Juno Beach, FL
Town of Kilmarnock, VA
Town of Leesburg, VA
Town of Mount Airy, MD
Town of Ocean City, MD
Town of Orange, VA
Town of Riverdale Park, MD
Town of Sykesville, MD
Town of Thurmont, MD
Town of University Park, MD
Town of Wytheville, VA
Upper Occoquan Service Authority
Vernon-Verona Sherrill Central Schools, NY
Village of Oak Park, IL
Village of Royal Palm Beach, FL
Washington County, FL
Washington County, MD
Washington County, MD Public Schools
Washington Suburban Sanitary Comm
West Virginia Municipal Pension Oversight Board
West Virginia State Police

Appendix: Bolton Public Sector Clients

Wicomico County, MD Board of Education
Wicomico County, MD Government
Williamsburg-James City, VA Schools
Worcester County, MD Board of Education
Wor-Wic Community College, MD

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 Dan Ripberger, Managing Director
[print individual's name and title]

Bolton Partners, Inc.; DBA Bolton for
[print name of entity submitting sworn statement]

whose business address is: 1 West Pennsylvania Ave., Suite 600, Towson, MD 21204 FEIN: 52-1231144 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:

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: *Dan Ripberger*
Title: Managing Director
Company: Bolton Partners, Inc.; DBA Bolton

NOTARY PUBLIC

MARYLAND
STATE OF ~~FLORIDA~~
CITY OF Towson

Sworn to and subscribed before me this day of February 7, 2024.

by Dan Ripberger who

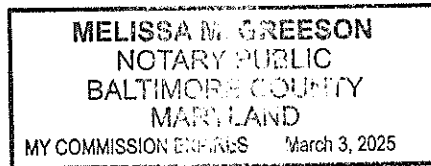
is personally known to me

OR Produced identification

_____ [type of

identification] My commission expires 3/3/25

Notary Public Signature *Melissa Greeson*
[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 Managing Director

Dan Ripberger

Printed Name Dan Ripberger

Date February 7, 2024