A Proposal to Conduct a
Classification and Compensation Study
for the City of Montgomery, TX

ORIGINAL

Evergreen Solutions, LLC

August 16, 2024

August 15, 2024

Gary Palmer, City Administrator
101 Old Plantersville Road
Montgomery, Texas 77316

Dear Mr. Palmer:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Classification and Compensation Study for the City of Montgomery. Our response is based on our review of your Request for Proposals, our experience in working with hundreds of local governments and other public sector organizations throughout the country, our understanding of the Texas labor market, and our knowledge of best practices in local government human resources management. **Evergreen is well qualified to provide the services being requested by the City of Montgomery as we have provided similar services to more than 1,300 local governments and other public sector organizations throughout the country.**

Evergreen was formed in 2004 to provide an alternative to traditional consulting firms. We provide an innovative and effective option by focusing on clients needing partners and not simply another service provider. Evergreen is licensed to transact business in the State of Texas under the name Recio and Ling Consulting, LLC (#32059488299).

As a national firm, Evergreen Solutions continues to grow and our territory now includes clients in 47 states, including many clients in the State of Texas. For example, Evergreen has been on contract or is currently on contract to work with the following public sector organizations in providing work similar in scope to the services being requested: City of Athens; City of Lockhart; City of Portland; City of Del Rio; City of Lakeway; City of Austin; City of Aransas Pass; City of Conroe; City of Coppell; City of Deer Park; City of Alpine; City of La Porte; City of Rowlett; City of Seguin; City of Buda; City of Missouri City; City of Amarillo; City of Beaumont; City of Denton; City of Farmers Branch; City of Mont Belvieu; City of DeSoto; City of Fate; City of Sachse; City of Gonzales; City of South Padre Island; City of Odessa; City of Haskell; City of Duncanville; City of Harlingen; City of Kingsville; City of Pflugerville; City of Seabrook; City of Texas City; City of Fredericksburg; City of Sunset Valley; Fort Bend County; Matagorda County; Hood County; Taylor County; Randall County; Denton County; Blanco County; Kaufman County; Burnet County; Jefferson County; Travis County; San Patricio County; Brazoria County; Town of Addison; The Woodlands Township; Town of Little Elm; Dallas Area Rapid Transit; Texas City Management Association; Brazos River Authority; Bexar Met; Denton County Fresh Water Supply District; Upper Trinity Regional Water District; Barton Springs/Edwards Aquifer Conservation District; New Braunfels Utilities; Montgomery County Emergency Communication District; Amarillo College; University of Texas at Tyler; Alvin Community College; South Texas College; Tarrant County College District; Sul Ross State University; Trinity University; Lone Star College System; El Paso Community College District; Midwestern State University; Austin Community College; Texas Southern University; Texas A & M University – San Antonio; Texas A & M University – Kingsville; Texas A & M University- Commerce; Sam Houston State University; San Jacinto Community College; Texas Wesleyan University; Angelo State University; Parker University; Alamo Colleges District; Prairie View A & M University; Brazosport College; Midland College; Irving Independent School District; El Paso Independent School District; and the Wayside School District. A detailed description of the services provided to some of these clients can be found in **Section 1** of our proposal.

In other states, Evergreen has worked with, or is currently on contract to work with, the following local governments in a variety of human resources and management capacities: City of Santa Fe, NM; City of Carlsbad, NM; City of Albuquerque, NM; City of Flagstaff, AZ; City of Prescott, AZ; City of Page, AZ; Town of Sahuarita, AZ; Yavapai County, AZ; City of Manitou Springs, CO; City of Fountain, CO; Grand County; Garfield County, CO; City of Camarillo, CA; City of Fresno, CA; City of Thousand Oaks, CA; City of Sacramento, CA; City of Sangar, CA; City of Yucaipa, CA; City of Long Beach, CA; Mariposa County, CA; Inyo County, CA; Calaveras County, CA; City of Boulder City, NV; Ogden City Corporation, UT; City of Albany, OR; City of Bend, OR; City of Portland, OR; Columbia County, OR; Spokane County, WA; City of Ridgefield, WA; City of Lee's Summit, MO; City of St. Peters, MO; City of Fulton, MO; City of Branson, MO; City of Columbia, MO; City of Troy, MO; City of St. Louis, MO; City of Jefferson, MO; City of Dardenne Prairie, MO; Jefferson County, MO; Jackson County, MO; St. Charles County, MO; Jasper County, MO; City of Broken Arrow, OK; City of Hot Springs, AR; City of Salina, KS; City of Leawood, KS; Sedgwick County, KS; Shawnee County, KS; Mahoning County, OH; Blount County, TN; City of Clarksville, TN; City of Murfreesboro, TN; City of Bloomington, IN; City of Urbana, IL; City of Moline, IL; McLean County, IL; Genesee County, MI; City of Kalamazoo, MI; City of Minneapolis, MN; City of Pittsburgh, PA; County of Montgomery, PA; Town of Bridgewater, MA; Town of Colchester, VT; Genesee

County, NY; City of Baltimore, MD; City of Hyattsville, MD; City of Annapolis, MD; City of Hagerstown, MD; City of Westminster, MD; Charles County, MD; Frederick County, MD; Prince George's County, MD; Talbot County, MD; Allegany County, MD; Washington County, MD; Kent County Levy Court, DE; City of Milford, DE; City of Newport News, VA; City of Fredericksburg, VA; City of Norfolk, VA; City of Covington, VA; City of Williamsburg, VA; City of Falls Church, VA; County of Culpeper, VA; County of York, VA; Gloucester County, VA; Essex County, VA; Surry County, VA; Isle of Wight County, VA; Prince George County, VA; James City County, VA; Louisa County, VA; Loudoun County, VA; Spotsylvania County, VA; Northumberland County, VA; Bedford County, VA; Shenandoah County, VA; Chesterfield County, VA; King George County, VA; Alleghany County, VA; Union County, NC; Gaston County, NC; New Hanover County, NC; Guilford County, NC; Transylvania County, NC; Dare County, NC; Jackson County, NC; Franklin County, NC; Vance County, NC; Harnett County, NC; Haywood County, NC; Buncombe County, NC; City of Raleigh, NC; City of Fayetteville, NC; City of Rocky Mount, NC; City of Goldsboro, NC; City of Hendersonville, NC; Town of Clayton, NC; City of Columbia, SC; City of Greenwood, SC; City of Lancaster, SC; City of Chester, SC; City of Rock Hill, SC; City of Spartanburg, SC; City of Conway, SC; City of Myrtle Beach, SC; City of Pickens, SC; City of Mauldin, SC; City of Goose Creek, SC; Berkeley County, SC; Dillon County, SC; Charleston County, SC; Dorchester County, SC; Spartanburg County, SC; Town of Hilton Head Island, SC; Town of Kiawah Island, SC; City of Atlanta, GA; City of Alpharetta, GA; City of Brookhaven, GA; City of Statesboro, GA; City of Norcross, GA; City of Garden City, GA; City of Sandersville, GA; City of Stockbridge, GA; City of Fayetteville, GA; City of Dublin, GA; City of Dunwoody, GA; City of Roswell, GA; City of Chamblee, GA; City of Savannah, GA; City of Cedartown, GA; City of Kingsland, GA; Forsyth County, GA; Lumpkin County, GA; Douglas County, GA; Columbus Consolidated Government, GA; Worth County, GA; Cherokee County, GA; City of Daphne, AL; City of Opelika, AL; City of Hartselle, AL; City of Auburn, AL; City of Foley, AL; Baldwin County, AL; Chambers County, AL; City of Sarasota, FL; City of Winter Park, FL; City of Orlando, FL; City of Sunrise, FL; City of Hollywood, FL; City of Melbourne, FL; City of Ft. Myers, FL; Miami-Dade County, FL; Palm Beach County, FL; Alachua County, FL; Manatee County, FL; Martin County, FL; Monroe County, FL; and Sarasota County, FL.

The Evergreen Team is able to fully comprehend the challenges and goals of the City of Montgomery based on our vast understanding of local government human resources, and the fact that we possess the necessary experience and knowledge. Our team has significant expertise in conducting classification and compensation studies for local governments and other public sector organizations, as evidenced in **Section 1** of our proposal.

Some of the human resource services Evergreen has focused on include: classification and compensation studies; salary and benefits surveys; staffing studies; workload analyses; performance management studies; HR department reviews; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability. Through our experiences in conducting this wide range of projects, we have gained knowledge of all operations in local government human resources management.

Evergreen's approach to conducting a classification and compensation study draws not only from extensive human resources work with local government clients, but also from direct feedback of our past clients. In essence, we offer you tools that are innovative as well as those that have been proven to work in real places with real people. Some of the key facets of our approach identified in **Section 3** of our proposal include:

- We emphasize communication as the key to successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in staff and managers alike. In order to ensure a successful study process and "buy-in" at implementation, administrators, department heads, and staff need to be involved in every step of the process. This is a critical component of our communication plan. Continuous communication is ensured through the use of meetings/conference calls and the submission of written progress reports.

- Our methodology utilizes the latest in technology. In order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be done on the Web. Further, our web-based *JobForce Manager* tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.

- We understand that one size does not fit all. Some consultants provide the same overall solution to every client; however, we provide a variety of alternatives that allow our client partners to select the solution that best meets their business and human capital needs.

As President of Evergreen Solutions, I am authorized to commit our firm contractually to this engagement. We have reviewed your terms and conditions and believe we can successfully work within your requirements.

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

Sincerely,

Jeffrey Ling, PhD, President
Evergreen Solutions, LLC

Table of Contents

Evergreen Solutions, LLC

Section 1.0
Company Overview and Qualifications

1.0   Company Overview and Qualifications

Evergreen Solutions is well qualified to conduct a Classification and Compensation Study for the City of Montgomery due to our experience in conducting more than 1,300 similar studies for local governments and other public sector organizations across the country, especially in the State of Texas. In this section, we provide you with the background and history of our firm, a list of similar studies we have conducted or are currently under contract to conduct in the State of Texas, and the qualifications of our proposed project team.

1.1 Firm's Background and History

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

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

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

Evergreen is licensed to transact business in the State of Texas under the name Recio and Ling Consulting, LLC (#32059488299). Evergreen employs 29 full-time and nine part-time employees who work on one of five consultant teams providing a variety of human resource management consulting.

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 management reviews; workload analyses; staffing studies; HR department reviews; disparity studies; efficiency studies; training assessments; and strategic planning.

We invite you to browse our Web site at **www.ConsultEvergreen.com** or visit us on Facebook at www.facebook.com or Linkedin at www.linkedin.com for more information about our services, staff, and past experience.

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 classification and compensation studies for local governments and other public sector organizations throughout the country, including many in the State of Texas;

- comprehensive experience in all components vital to the successful completion of this engagement;

- knowledge of relevant Texas 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.

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.

Exhibit 1-1 includes a sample list of public sector clients in the State of Texas that Evergreen has worked with, or is currently on contract to work with, providing work similar in scope to the services being requested.

Exhibit 1-1: Texas Public Sector HR Clients

Alamo Colleges District	City of Harlingen	Jefferson County
Alvin Community College	City of Haskell	Kaufman County
Amarillo College	City of Kingsville	Lone Star College System
Angelo State University	City of La Porte	Matagorda County
Austin Community College	City of Lakeway	Midland College
Barton Springs/Edwards Aquifer Cons. District	City of Lockhart	Midwestern State University
Bexar Metropolitan Water District	City of Missouri City	Montgomery County ECD
Blanco County	City of Mont Belvieu	New Braunfels Utilities
Brazos River Authority	City of Odessa	Parker University
Brazoria County	City of Pearland	Prairie View A & M University
Burnet County	City of Pflugerville	Randall County
City of Amarillo	City of Portland	Sam Houston State University
City of Aransas Pass	City of Rowlett	San Jacinto Community College
City of Athens	City of Sachse	San Patricio County
City of Alpine	City of Seabrook	South Texas College
City of Beaumont	City of Seguin	Sul Ross State University
City of Big Spring	City of South Padre Island	Taylor County
City of Buda	City of Sunset Valley	Tarrant County Community College District
City of Conroe	City of Temple	Texas A & M University – Commerce
City of Conway	City of Texas City	Texas A & M University – Kingsville
City of Coppell	Dallas Area Rapid Transit	Texas A & M University – San Antonio
City of Deer Park	Denton County	Texas Southern University, Houston
City of Del Rio	Denton Co. Fresh Water Supply District	Texas City Management Association
City of Desoto	El Paso Independent School District	Town of Addison
City of Denton	Fort Bend County	The Woodlands Township
City of Duncanville	Fort Worth Housing Solutions	Town of Little Elm
City of Farmers Branch	Harris-Galveston Subsidence District	Travis County
City of Fate	Hill County	Trinity University
City of Fredericksburg	Hood County	University of Texas at Tyler
City of Gonzales	Irving Independent School District	Wayside School District
		Waller County

OVER *85* TEXAS PROJECTS
AND OVER *1300* NATIONWIDE
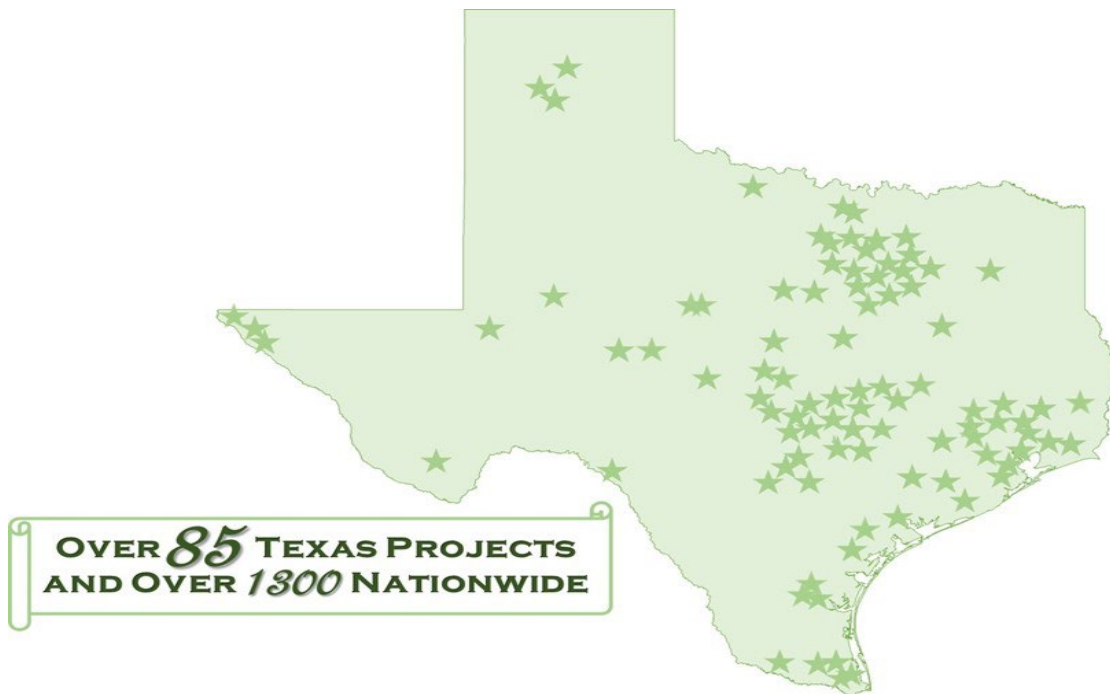
1.2
Select Relevant Experience

Because Evergreen has conducted more than 1,300 classification and/or compensation studies since its inception, we include in this section a list of similar local government projects that we have conducted or are currently on contract to conduct in the State of Texas. **Note:** Evergreen has also worked for many other public sector organizations in the State of Texas as you can see in **Exhibit 1-1.**

Compensation and Classification Study
City of Coppell, Texas

Evergreen Solutions was engaged with the City of Coppell to conduct a Compensation and Classification Study. Evergreen reviewed existing job functions by position as they pertained to the current and recommended structure; examined current market position using peer comparisons; developed a comprehensive labor market salary survey for the North Texas region that included other local municipalities; analyzed existing internal hierarchy based on job relationships and essential functions, identifying problem areas within the internal hierarchy system and proposed implementation methods to correct identified problems; developed a pay plan; reviewed and recommended assignments of all positions to an appropriate pay grade, and made recommendation(s) for corresponding education and experience requirements by classification; reviewed and revised job descriptions; and recommended implementation strategies, including calculating the cost of implementing the study results.

Classification and Compensation Study
City of Athens, Texas

Evergreen Solutions was retained by the City of Athens to conduct a Classification and Compensation Study by revising and/or creating a job classification and compensation structure to ensure a fair and equitable system both internally and externally. Evergreen performed the following tasks: conducted job evaluations to establish and/or redefine grades/ classifications groups and job relationships; identified benchmark jobs from each grade/classification to survey; determined a relevant job market; conducted a customized market salary and benefit package survey for all classification groups; performed survey data analysis and recommended pay structures; and met with City Management and key staff to determine implementation strategies (including multi-year implementation strategies if needed) to present to the City Council. In the end, Evergreen provided recommendations for the ongoing internal administration and maintenance of the proposed compensation and classification plan.

Job Classification, Salary Survey, Compensation Plan Study Services
City of Duncanville, Texas

Evergreen was engaged with the City of Duncanville to provide professional Job Classification, Salary Survey, and Compensation Pay Plan Study Services that allowed the creation of a comprehensive job classification and compensation system and pay plans for employees within the City. Evergreen's consultants reviewed and analyzed the City's current structure and practices of job classifications and job descriptions including: conducting orientation sessions; providing questionnaires; conducting management and employee interviews; reviewing questionnaire responses with supervisory and management staff; performing a job analysis; and developing and/or revising job descriptions.

Evergreen prepared a customized market survey of salaries of the local and area municipalities that included all of the competitive markets where the city recruited employees. Evergreen established a system for an ongoing and easily understood maintenance of the new, or updated, pay plan that was easy for employees to understand and for managers to administer. The recommended pay plan effectively balanced market and internal equity supported the classification system, and promoted an employee's perception of organizational fairness and equity in the City. **Note:** Evergreen was again hired in 2023 to conduct a Classification and Compensation Study Update.

Compensation and Classification Study
City of Beaumont, Texas, Texas

Evergreen Solutions was retained by the City of Beaumont to conduct a Compensation and Classification Study for its 1,295 employees. Evergreen examined internal equity to determine whether positions were properly classified as well as external equity to determine whether the City was competitive in the market.

Classification and Compensation Study
City of Kingsville, Texas

Evergreen Solutions was retained by the City of Kingsville to conduct a Classification and Compensation Study for 1,172 employees. Evergreen conducted a market salary survey and job analysis to determine internal and external equity and updated the City's personnel manual.

Classification and Compensation Study
City of Alpine, Texas

Evergreen is hired to conduct a Classification and Compensation Study for the City of Alpine. Evergreen will complete a classification and compensation study of public employees who are providing equitable services; determine the changes needed in existing position descriptions and update them as needed; prepare a comparative analysis that identifies the City's competitive position in a comparable labor market; provide a recommendation for total salaries and benefits; outline promotional opportunities; prepare a pay structure; and prepare recommendations for compensation rules and policies.

Comprehensive Compensation and Classification Study
City of Farmers Branch, Texas

Evergreen was engaged with the City of Farmers Branch to conduct a Comprehensive Compensation and Classification Study. The primary objectives of the study were to: review and revise current classification system; determine relevant competitive markets; develop a custom compensation survey to distribute to peer organizations; propose guidelines for an improved or new compensation program and step/grade plan; and provide recommendations to keep the current pay structure competitive. **Note:** Evergreen was again hired in 2021 to conduct a Compensation and Benefits Study.

Classification and Compensation Study
City of Lockhart, Texas

Evergreen was retained by the City of Lockhart to conduct a classification and compensation study of its workforce. Employees participated in focus groups, interviews, and a job analysis was conducted to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current system.

Classification, Compensation & Benefits Study
City of Portland, Texas

Evergreen was engaged with the City of Portland (City) to conduct a Classification, Compensation and Benefits Study. Evergreen's consultants evaluated jobs within the City and the current pay and benefits structure. A market survey of salary and benefits was conducted among peers approved by the City. Based on the survey results, Evergreen's consultants made recommendations for changes to the current classification and compensation system, as well as provided a maintenance tool that the Human Resources Department could use to keep the system current and equitable. Training on this maintenance tool was also provided. **Note:** Evergreen was again hired in 2024 to conduct a similar study.

Comprehensive Compensation and Benefits Study
City of Rowlett, Texas

Evergreen was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include "on call" pay. Evergreen's consultants identified any weaknesses within the components of the City's existing compensation package that would negatively impact the organization's ability to attract and retain talented employees.

Comprehensive Compensation and Benefits Study
City of Sachse, Texas

Evergreen was hired by the City of Sachse to conduct a Comprehensive Compensation and Benefits Study. The study measured and provided an analysis on base salary, pay/step plans, employer-provided medical benefits packages and any other incentive-based compensation options, including "on call" pay. To ensure the project's validity and applicability, Evergreen conducted a compensation analysis using similar-sized local municipalities for comparison and recommended comparator cities for consideration. The following study components were compared: pay ranges with comparator cities performing the same or similar functions; actual employee pay with comparator cities performing the same or similar functions; pay/step plans/special assignment pay with comparator cities performing the same or similar functions; and city-provided comprehensive employee benefits packages with comparator cities performing the same or similar functions.

Evergreen recommended pay structure features that provided opportunities for advancement while minimizing salary overlap between levels of responsibility. **Note:** Evergreen was again hired to conduct a classification study for select positions.

Classification and Compensation Study
City of Conroe, Texas

Evergreen was retained by the City of Conroe to conduct a Classification and Compensation Study. The scope of the study included the following major components: review and update and/or rewrite of all city job descriptions; work with a City management team to revise the existing pay plan for both Civil Service and non-Civil Service personnel structures; and evaluate current salary structure and compensation levels for all regular, classified positions and non-classified positions, and recommend appropriate adjustments.

Classification and Compensation Study
City of Seguin, Texas

Evergreen was hired to assist the City of Seguin in designing and implementing a comprehensive classification and compensation plan for its workforce of 330 full-time employees. The scope of the project included two major components: (1) Working with a City management team to revise the existing pay plan and structures; and (2) Evaluating current salary structure and compensation levels for all regular, classified positions and recommending appropriate adjustments. Specifically, Evergreen's consultants reviewed the City's current classification/compensation plan; surveyed management and identified problem areas regarding the classification and compensation system; conducted a salary survey to ensure external equity; reviewed current policies and procedures; reviewed salary structure to determine appropriateness; and provided technical assistance and training to City staff to facilitate the implementation and the maintenance of the recommended system and procedures. **Note:** Evergreen was again hired in 2023 to conduct a Compensation Benchmarking and Structure Analysis.

Pay Structure Study
City of Fate, Texas

Evergreen was hired to develop a new pay plan for the City of Fate. Evergreen performed the following tasks: reviewed the City's salary data; created a new pay plan for the City; slotted current jobs into the new play plan; and verified the internal equity of the new pay plan.

Classification and Compensation Study
City of Pflugerville, Texas

Evergreen was hired by the City of Pflugerville to conduct a Classification and Compensation Study for its workforce of over 300 full- and part-time employees. Evergreen analyzed each position within the City by conducting interviews and job audits; evaluated employee position descriptions and duties; interviewed department heads and managers; and assessed classifications within positions (I, II, III, or Lead, Foreman). Evergreen reviewed current job descriptions, focusing on the purpose, job scope, essential duties and responsibilities, education/training requirements, physical job requirements, and working conditions, determined FLSA status (exempt/non-exempt) for positions under federal regulations, and recommended which positions were essential positions in the event the City had a temporary closure. Based on this review, Evergreen presented a proposed classification structure to City management and incorporated input into the final classification document, including a cost analysis for positions that would require adjustments.

Evergreen surveyed the cities of Georgetown, Round Rock, Hutto, Cedar Park, Leander, San Marcos, and College Station to compare compensation and benefit structures in addition to minimum and maximum rates of pay for select positions and will soon make recommendations toward appropriate ranges for rates of pay for each position identified. This included a minimum, mid-point, and maximum, with 1st and 3rd quartile designations. A Salary Grade Chart was prepared based on these recommendations and was presented to management for final approval. **Note:** Evergreen was again hired in 2021 to conduct a staffing study for the City.

Pay and Classification Study
City of Fredericksburg, Texas

Evergreen was engaged with the City of Fredericksburg to conduct a Pay and Classification Study and make recommendations for implementation of a revised pay plan. The study included all employees and classifications in the City. As part of the study, Evergreen consultants conducted focus groups and interviews with employees, and employees completed a Job Assessment Tool (JAT). Evergreen consultants also conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive pay plan. **Note:** Evergreen is on retainer to provide the City with classification, pay grade assignments, organizational management and other on-going human resources support.

Human Resources Department Assessment (Classification and Compensation Study)
City of Buda, Texas

Evergreen was engaged with the City of Buda to conduct a Human Resources Department Assessment. Evergreen's consultants provided a job analysis questionnaire and procedures for future updating and new position creation and developed and fully defined a systematic procedure for evaluating positions using the "point factor method". A worksheet was developed for departments to request a job evaluation for upgrades within a position or for a new position for submission to Human Resources to ensure that job titles were consistently used on job descriptions and the pay plan.

Evergreen further created a new cost effective, affordable compensation structure and management plan that was systematically and equitably acknowledge and rewarded an employee's performance and skills. Evergreen designed a compensation program that included a description and justification of the pay philosophy, a completed pay structure, and rules for moving employees through the pay structure based on their increasing contributions in support of the City. Evergreen consultant's gathered actual salary data from market surveys, local governmental agencies, benchmarked cities, and other appropriate data, as deemed necessary. The recommended compensation structure included a proposed training/career progression plan, including documentation as appropriate, and a plan that rewards employee performance fairly and equitably, with measures that can be documented.

Note: Evergreen was again selected by the City of Buda in 2020 to conduct a Market Salary Update.

Classification and Compensation Study
City of Sunset Valley, Texas

Evergreen was hired by the City of Sunset Valley to assist with a City-wide Compensation and Classification Study, as well as development of a Performance Evaluation System. The study also included a Human Resources Audit and recommendations to strategically align the processes, procedures, staffing, and organization of human resources functions. All employees and classifications in the City were included in the study. As part of the study, the Evergreen Team conducted interviews and focus groups with all City employees. Evergreen consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. Finally, a detailed plan was developed to provide the City with specific steps to implement an equitable and competitive compensation plan.

Classification and Compensation Pay Plan
City of Amarillo, Texas

Evergreen Solutions was engaged with the City of Amarillo to develop a Classification and Compensation Pay Plan for 2,835 employees. Evergreen's consultants: reviewed the City's existing classification/compensation system; worked with the City's Human Resources Director and staff to identify a market position for the City; gathered necessary information through the use of questionnaires, job audits, some personal interviews; discussed and determined the appropriate labor market for the compensation survey; analyzed existing internal hierarchy based on job relationships and proposed implementation methods to correct any identified specific problems; developed a pay plan identifying specific parameters; and reviewed and assigned all positions to an appropriate pay grade. In the end, Evergreen recommended implementation strategies including calculating the cost of implementing the study and provided the Human Resources staff with training to maintain and revise the system, as needed.

Compensation Market Review and Classification Study
City of Austin, Texas

Evergreen was contracted to review the City of Austin's classification system for the Human Resources job family. The study's primary purpose was to review the City's classification structure for its human resources jobs and to ensure that all employees working in the human resources area were properly classified based upon the work they performed. To accomplish this purpose, Evergreen met with each Human Resources Manager and conducted extensive outreach sessions (desk audits) with a large percentage of human resources employees. In addition to the interviews and desk audits, Evergreen consultants reviewed Position Analysis Questionnaires (PAQs), job descriptions, organizational charts, and other documentation. The job analysis resulted in recommendations for a job hierarchy within the Human Resources family and the slotting of each individual within the proposed classification system. Evergreen consultants also worked with the Human Resources Department to ensure that the proposed classification system properly aligned with the compensation system. At the conclusion of the study, job descriptions were revised for each job and FLSA exempt status were provided for each job classification.

Classification and Compensation Study
City of Gonzales, Texas

Evergreen was retained by the City of Gonzales to conduct classification and compensation study for all employees. Employees participate in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were reviewed, as needed, and FLSA determinations were made. Evergreen consultants conducted a market salary survey to identify pay ranges in the public and private sector in order to determine the appropriate pay levels for all included jobs in the City. Recommendations were provided to improve the fairness and equity within the City and a plan was provided to address maintenance of implemented changes to the City's classification and compensation system.

Salary Survey
City of Lakeway, Texas

Evergreen was retained by the City of Lakeway to provide consulting services for the Human Resource Department and to design and implement a salary survey which would classify all City positions appropriately within the plan structure. The Evergreen Team evaluated the City's current salary structure as compared to the specific job market for comparable positions in the public and private sectors. Additional reviews were conducted for existing job descriptions to recommend updates for specific requested positions. Evergreen ensured that content and titles were current, accurate, and consistent with Fair Labor Standards Act (FLSA) and Equal Employment Opportunity (EEO). **Note:** Evergreen was again hired in 2019 to conduct a staffing analysis for the City.

Compensation and Classification Study
City of Mont Belvieu, Texas

Evergreen Solutions was retained by the City of Mont Belvieu to conduct a Compensation and Classification Study. Evergreen performed a comprehensive analysis of the City's current classification and compensation plan by performing the following tasks: placing positions in the current pay plan to ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; determining the accuracy of Federal Labor Standards Act ("FLSA") exemption status of all positions; determining the accuracy of position titles and descriptions regarding unique characteristics of the position, essential job functions, minimum qualifications, working conditions, licensing requirements, "on call" requirements and supervisory requirements; must accommodate the unique nature of certain functions and responsibilities characteristic of City government; identifying potential pay compression issues and providing potential solutions; and analyzing existing internal hierarchy and internal career ladders where appropriate and clearly outlining job progression opportunities and providing recognizable compensation growth. **Note:** Evergreen previously conducted a Pay for Performance and Salary Survey for the City.

Classification and Compensation Study
City of League City, Texas

Evergreen Solutions was retained by the City of League City to conduct a Classification and Compensation Study. Evergreen conducted a job analysis to determine the hierarchy of jobs within the City to ensure internal equity and conducted a salary survey to determine whether the salaries at the City were competitive in the market. Evergreen also review and update job descriptions and provided recommendations for the continued maintenance of the revised classification and compensation plan.

Compensation and Classification Study
City of Texas City, Texas

Evergreen Solutions was engaged with the City of Texas City to conduct a Compensation and Classification Study. The purpose of the comprehensive study was to develop a clear, equitable, consistent and competitive classification and compensation structure that fosters retention of qualified individuals while providing opportunities for growth and development within and provides the Human Resources Department a framework to operate within to maintain the system. Evergreen worked with the City to develop a compensation program that is fair, equitable, and competitive with other municipalities in the surrounding geographic market area from which the City of Texas City recruited and lent itself to a total rewards package. Evergreen further worked with the City to develop a classification system that facilitated ongoing compensation analysis and reporting based on similarly-situated employees, similar skills, qualifications, responsibilities, and pay, using job family grouping and EEO job categories that comported with EEOC guidelines for government employees and provided the City with a tool that the HR department could use to continue that evaluation/analysis process.

Comprehensive Classification and Compensation Study (Included a Performance Management Study and a Staffing Study)
City of Odessa, Texas

Evergreen Solutions was engaged with the City of Rowlett to conduct a comprehensive compensation and benefits study for 1,140 employees. The primary goal of the study was to ensure that the City was recognized as an employer of choice that provides a viable, cost effective and competitive pay structure. The study measured and provided a compensation analysis on (a) base salary, (b) pay/step plans, (c) employer-provided medical benefits packages and (d) any other incentive-based compensation options, to include "on call" pay. Evergreen's consultants identified any weaknesses within the components of the City's existing compensation package that would negatively impact the organization's ability to attract and retain talented employees.

Compensation and Classification Study
City of Denton, Texas

Evergreen Solutions was retained by the City of Denton to conduct a Compensation and Classification Study for its 1,786 employees. Evergreen worked with the City to develop a communication strategy and plan that allowed the City to be informed and be as transparent as possible and met and solicited feedback and input from different levels of the City including employees, department directors/managers, and executive management. Evergreen conducted a comprehensive market compensation study and provided recommendations to ensure that the City's compensation system supports the City's mission, strategic objectives, and compensation philosophy. Evergreen further conducted a job analysis for up to 50 positions of concern to ensure appropriate pay grade classification and address internal equity concerns and will evaluate current pay grades, e.g. number of pay grades, including additions, deletions, and/or consolidations; appropriate spread between minimum and maximum of pay ranges, and recommend a strategy for improvements. Evergreen reviewed and recommended solutions for a pay for performance system/process.

Compensation Study and FLSA Review
City of La Porte, Texas

Evergreen is hired by the City of La Porte to conduct a Compensation Study and FLSA Review. Evergreen's consultant will examine the City's current compensation system covering non-civil service positions and provide recommendations for compensation policies, procedures, and overall compensation philosophy and make FLSA determinations. In the end, Evergreen will recommend a revised compensation plan that will eliminate and avoid compression issues and aide the City in attracting and retaining qualified employees **Note:** This project is nearing completion.

Pay and Classification Study
City of Fredericksburg, Texas

Evergreen Solutions was again engaged with the City of Fredericksburg to conduct a Compensation Study in order to make recommendations for the implementation of a revised pay plan. Evergreen's consultants conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the City. **Note:** Evergreen was again hired in 2021 to conduct a compensation study in order to update the City's pay plan.

Compensation Study
City of Aransas Pass, Texas

Evergreen Solutions was retained by the City of Aransas Pass to conduct a Compensation Study. Evergreen analyzed the City's current pay and benefit practices to determine whether they were competitive in the market to better assist the City in retaining and attracting a talented workforce.

Classification and Compensation Study and Staffing Analysis
City of Harlingen, Texas

Evergreen Solutions was retained by the City of Harlingen to conduct a Classification and Compensation Study and a Staffing Analysis. Evergreen's consultants performed the following tasks:

- conducted a comprehensive evaluation of every job class within the City to establish appropriate classification and pay grade assignments as well as pay ranges and step progressions within the ranges;

- conducted a compensation survey of the market including comparable Texas municipalities, and, appropriate private sector competitive employers;

- prepared a new salary structure based on the results of the survey and best practice research;

- analyzed and recommended changes to the present compensation structure to meet market analysis;

- reviewed current compensation plan (salary grade levels and steps) to better understand current challenges in recruiting and retaining employees;

- recommended and identified a consistent and competitive market position that the City could strive to maintain;

- recommended appropriate salary range for each position based on the proposed classification plan, the compensation survey results, internal equity and external parity;

- reviewed staffing levels and make recommendations;

- prepared a new salary structure based on the results of the survey and best practices;

- recommended implementation strategies including calculating the cost of implementing the plan;

- identified any extreme current individual or group compensation inequities and provided a recommended corrective action plan and process to remedy these situations;

- recommended and provided implementation strategies related to other key compensation practices, based on market demands; and

- presented findings and recommendations to City Administration as well as the Harlingen City Commission at a regularly scheduled commission meeting.

Classification and Compensation Study
City of Del Rio, Texas

Evergreen is retained by the City of Del Rio to conduct a classification and compensation study. Evergreen will ensure that job positions are accurately classified and appropriately compensated based on factors such as job duties, skills, market conditions, and organizational goals. Evergreen will also review the City's certification pay plan.

Classification and Compensation Study and Analysis
Taylor County, Texas

Evergreen Solutions is retained by Taylor County to conduct a Classification and Compensation Study and Analysis. Evergreen's consultants will perform the following tasks: provide a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and for the establishment of pay ranges and step progressions within the ranges; 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 with comparable Texas Counties as required; identify potential pay compression issues and provide potential solutions; analyze and recommend changes to the present compensation structure to meet market analysis. This recommendation may include recommendations for individual positions as well. **Note:** This project is nearing completion.

Compensation, Classification, and Benefits Study
Denton County, Texas

Evergreen conducted a Comprehensive Compensation, Classification and Benefits Study for the more than 1,550 employees of Denton County. The County had not performed a comprehensive classification and compensation study in 15 years. Evergreen consultants conducted employee orientations, focus groups and interviews, and conducted job

analysis of all included positions. This information was used to create an internal equity alignment that is consistent with current job duties and responsibilities. As part of the project, Evergreen conducted a comprehensive salary and benefits survey of local and regional labor market peers to properly assess the County's competitive position for wages and benefits. Evergreen provided customized and detailed recommendations for adjusting the County's compensation and classification structures based on internal and external equity. Implementation options that were equitable and cost efficient were developed and additional recommendations for maintaining the system over time were also provided. Additionally, revised classification descriptions with FLSA determinations were provided.

Classification and Compensation Study and Analysis
Matagorda County, Texas

Evergreen was hired to conduct a Classification and Compensation Study and Analysis for Matagorda County. The primary objectives of the study are to: attract and retain qualified employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and maintain a competitive position with other comparable government entities and private employers within the same geographic areas.

Employee Compensation Consulting Services
Ft. Bend County, Texas

Evergreen was retained by Fort Bend County to provide employee compensation consulting services for its 2,800 employees. Evergreen conducted the following tasks:

- reviewed current compensation plan including policy groups and salary structures;

- conducted Fair Labor Standards Act (FLSA) exempt/non-exempt status review of all positions;

- analyzed internal equity and possible compression issues;

- completed salary survey of City and County governments in the State of Texas as designated by the County;

- designed and executed a salary survey, analyzed results and made recommendations; and

- evaluated and determined each employee's proper step placement on the newly approved salary grade structure.

Note: Evergreen was previously hired to conduct a similar study for the County.

Compensation Consulting Services
Travis County, Texas

Evergreen Solutions was hired by Travis County to provide Compensation Consulting Services. Evergreen performed the following:

- reviewed and provided input to the Travis County Compensation Manager and staff on their approach and strategy with redesigning the Travis County Classified compensation scale;

- shared input and provided best practices to consider based on paygrades, band width, and other design elements;

- reviewed the compensation work of the Travis County Compensation division related to the redesign of the Travis County Classified compensation scale and provided input based on work product review;

- discussed approach and strategy with the redesign of the Peace Office Pay Scale, to include minimum and maximum ranges based on Travis County's researched market data for FY2020;

- discussed best practices with use of Peace Office Pay market data when determining how to gauge market competitiveness; and

- provided other consultative support with projects being proposed or implemented by the Travis County Compensation team.

Note: Evergreen previously conducted a Compensation Analysis and an IT Analysis and Compensation System Design.

Classification and Compensation Study
Burnet County, Texas

Evergreen Solutions was retained by Burnet County to conduct a Classification and Compensation Study. Evergreen's consultants conducted a job analysis to determine the appropriate classification structure for the County and conducted an external salary survey to determine the County's competitiveness with peer organizations in the labor market.

Compensation and Classification Study
Brazoria County, Texas

Evergreen was retained by the Brazoria County to conduct a Compensation and Classification Study. Evergreen developed a compensation program for the County, evaluated current pay grades, and developed a classification system to facilitate the ongoing compensation analysis. Evergreen further assessed position titles and identified appropriate employee status in accordance with FLSA. Evergreen then proceeded to develop multiple alternative recommendations and a communication plan. Finally, Evergreen reviewed and developed different policies procedures and proposed different recommendations.

Classification and Compensation Study and Analysis
Waller County, Texas

Evergreen Solutions was retained by Waller County to conduct a Classification and Compensation Study and Analysis. The objectives of the study were to: attract and retain qualified and quality employees; ensure positions performing similar work with essentially the same level of complexity, responsibility, and knowledge, skills, and abilities are classified together; provide salaries commensurate with assigned duties; outline promotional opportunities and provide recognizable compensation growth; provide justifiable pay differential between individual classes; and develop and maintain a competitive position with other comparable government entities and private-sector employers within the same geographic areas.

Salary Compensation Study
Hood County, Texas

Evergreen was engaged with Hood County to provide an update of their classification and compensation system. Evergreen evaluated the current system, collected and reviewed current environment data, and evaluated and built the projected classification plan. Evergreen identified a list of market survey benchmarks and conducted a market survey. Evergreen's consultants provided the County with the external assessment summary, developed strategic positioning recommendations, and developed and submitted draft and final reports and recommendations for compensation administration. Additionally, Evergreen updated and/or rewrote job descriptions for the County, as necessary, based on the recommendations. **Note:** Evergreen was again hired in 2020 to conduct a staffing study for the County.

Classification and Compensation Study
Kaufman County, Texas

Evergreen Solutions was engaged with Kaufman County to conduct a Compensation Study. Evergreen worked with the County to establish appropriate benchmarking standards and conducted a salary survey for similar positions with comparable entities. Evergreen identified potential pay compression issues and provided potential solutions and analyzed and recommended changes to the current compensation structure that met market analysis. Evergreen also provided a comprehensive evaluation of every job within the County to determine relative worth within the organization for internal equity and reviewed all current job classifications, confirmed, and recommended changes to hierarchical order of jobs using an approved evaluation system.

Classification and Compensation Study
Blanco County, Texas

Evergreen Solutions was retained by Blanco County to conduct a Classification and Compensation Study. Evergreen's consultant conducted a job analysis to determine the proper hierarchy of jobs within the County; conducted a salary survey and analysis to determine competitive market rates; updated job descriptions; and prepared a final report with cost analysis for implementation of all recommendations.

Wage and Compensation Study
Jefferson County, Texas

Evergreen Solutions was engaged with Jefferson County to conduct a Wage and Compensation Study. The objective of the study was to enhance the County's ability to attract, motivate, and retain quality employees to efficiently and cost-effectively deliver services and programs to the citizens of the County through obtaining a Salary Range Comparison of 175 benchmarks positions – within the current surrounding local market and similarly situated Counties in Texas. Based on the market survey results, Evergreen updated the existing plan for the County, including the realignment of jobs within the County's current pay grade.

Classification and Compensation Study
Town of Addison, Texas

Evergreen Solutions was retained by the Town of Addison to conduct a Classification and Compensation Study. Evergreen's consultants performed the following tasks: provided a comprehensive evaluation of every job within

the City to determine the relative worth within the organization for internal equity and for the establishment of pay ranges and step progressions within the ranges; reviewed all current job classifications, confirmed, and recommended changes to hierarchical order of jobs using Evergreen's evaluation system; conducted a salary survey for similar positions with comparable Texas entities; identified potential pay compression issues and provided potential solutions; and analyzed and recommended changes to the present compensation structure to meet the market analysis.

Classification and Compensation Study
Town of Little Elm, Texas

Evergreen was retained by the Town of Little Elm to conduct compensation and classification study of its employees. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. Classifications were also reviewed, as needed, and FLSA determinations will be made. The rank structure for police and fire department employees were reviewed against peer organizations to determine whether the current structure for each department is effective for its size. Evergreen consultants reviewed pay policies and practices and pay ranges in the public and private sector were analyzed to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity within the Town. Evergreen provided Town staff with the necessary training and materials so that an understanding of the methodology and how to implement, administer, and maintain the recommended total compensation system would be accomplished.

Compensation and Classification Study
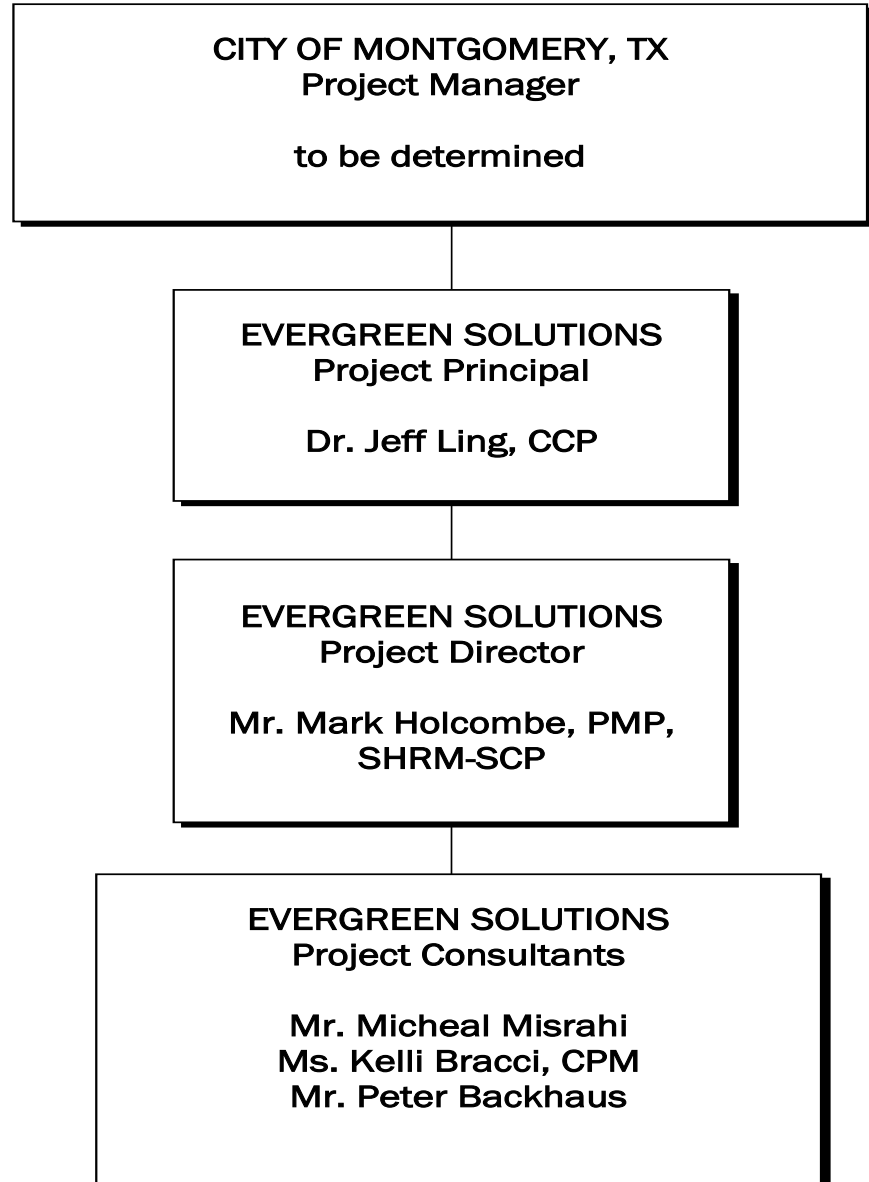## The Woodlands Township, Texas

Evergreen Solutions was retained by The Woodlands Township to conduct a Compensation and Classification Study. Evergreen provided an independent analysis of the compensation plan and developed and recommended a compensation philosophy that met the Town's objective of where they desired to be in the market regarding salaries. Evergreen's consultants designed, proposed, and led the Township in implementing a comprehensive compensation plan that aligned with the proposed compensation philosophy and classified all Township positions appropriately within the plan structure. Evergreen further conducted a job analysis, collected and analyzed the data collected from the JATs and MITs, provided classification recommendations; and recommended any changes to job descriptions based on the data collected.

1.3
Proposed
Project Team

Exhibit 1-2 reflects our proposed project management and personnel assignments. The structure has been designed to clearly define the roles and responsibilities of each part of the Classification and Compensation Study so that there will be no confusion as to who is responsible for any aspect of this engagement with the City of Montgomery.

Exhibit 1-2
Proposed Project Management and Personnel Assignments

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│         CITY OF MONTGOMERY, TX           │
│            Project Manager               │
│                                          │
│           to be determined               │
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          ┌──────────────────────────┐
          │   EVERGREEN SOLUTIONS     │
          │     Project Principal     │
          │                           │
          │    Dr. Jeff Ling, CCP     │
          └──────────────────────────┘
                    │
          ┌──────────────────────────┐
          │   EVERGREEN SOLUTIONS     │
          │     Project Director      │
          │                           │
          │  Mr. Mark Holcombe, PMP,  │
          │        SHRM-SCP           │
          └──────────────────────────┘
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       ┌────────────────────────────────┐
       │     EVERGREEN SOLUTIONS        │
       │     Project Consultants        │
       │                                │
       │     Mr. Micheal Misrahi        │
       │    Ms. Kelli Bracci, CPM       │
       │      Mr. Peter Backhaus        │
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City of Montgomery Project Manager. With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The City's Project Manager (CPM) will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the CPM and all project deliverables will be filtered through the CPM throughout the duration of the project.

Evergreen Solutions' Project Principal. Our Project Principal will have ultimate accountability for the success of this project. Evergreen Solutions' Project Principal is always a senior leader in our firm, typically the President. The Project Principal will have contractual authority over the contract and will be our top level of project responsibility.

Evergreen Solutions' Project Director. Evergreen Solutions designates a Project Director for each HR consulting project. The Project Director will work with the Project Principal regarding the scheduling of the project with the City. The Project Director will have the most frequent contact with the City and will assign project activities to the Project Consultants and will ensure that deliverables are met within specified timelines.

Evergreen Solutions' Project Consultants. Our Project Consultants are a team of consultants who have worked together on numerous projects, and who will provide consulting and analytical work on all project activities. The Project Consultants will review pay plans, conduct orientation sessions and focus groups, administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT), collect the data for the salary survey, review and revise job descriptions, and prepare draft and final reports.

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Our firm is proposing an exceptional team of consultants who have worked together on many similar projects. We always make sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Classification and Compensation Study for the City of Montgomery.

Key Personnel

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

**Project Principal
Dr. Jeff Ling**

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

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

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

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 includes:

- **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 1,300 public sector projects related to Classification and/or Compensation, including more than 85 in the State of Texas.**

- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.

- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.

- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

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

**Project Director
Mr. Mark Holcombe,
PMP, SHRM-SCP**

Mr. Holcombe has more than ten years of management and consulting experience and is recognized as a certified Project Management Professional (PMP) and a SHRM Senior Certified Professional (SHRM-SCP). He has been at Evergreen Solutions seven years, during which time he has promoted through the organization and has led Evergreen's largest local government practice for the past two years. His academic foundation in

micro and macroeconomics, combined with his experience leading a business before joining Evergreen, has given him significant experience in leading teams, modeling and controlling costs, and working to provide a product that meets the needs of all stakeholders. This experience has been instrumental in ensuring that his team is able to translate complex and comprehensive data into actionable insights for his clients.

At Evergreen, Mr. Holcombe's emphasis has been in compensation and classification studies of varying size and scope. He has led projects with cities and counties, colleges and universities, K-12 school districts, transportation organizations, and statewide government organizations.

Some of his principal areas of expertise are:

- Refining client compensation and classification systems, ensuring alignment with HR best practices and meeting specific client needs.

- Leading initiatives focusing on market competitiveness for large and complex public sector clients.

- Constructing reports and visuals to share complex findings in an approachable way.

- Crafting complex cost models to facilitate accurate budgetary projections for clients.

- Assessing market data, synthesizing information from a variety of sources to provide comprehensive compensation insights.

- Redesigning classification systems to modernize and streamline titling conventions for entire organizations or within job families.

- Conducting reviews centered around gender and racial equity in compensation systems, ensuring their adherence to local, state, and federal laws and regulations.

A sample of some of the public sector projects that Mr. Holcombe has been involved with include: a Compensation Study for the City of Buda, TX; a Classification and Compensation Study and Analysis for Taylor County, TX; a Classification and Compensation Study for the City of Alpine, TX: a Compensation Study and FSLA Review for the City of La Porte, TX; a Compensation and Benefits Study for the City of Portland, TX; a Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; a Compensation and Classification Study for the Woodlands Township, TX; a Classification and Compensation Study for Randall County, TX; Compensation Consultant Services for Dallas Area Rapid Transit, TX; Competency Modeling and Succession Planning for Dallas Area Rapid Transit, TX; a Classification and Compensation Study for the City of Mont Belvieu, TX; a Compensation and Classification for the City of Denton, TX; a Comprehensive Market Salary and Benefits Study for the City of Missouri City, TX; a Classification and Compensation Study for the City of Beaumont, TX; a Compensation and Benefits Survey and Analysis for the City of Deer Park, TX; a Compensation Study for the City of Duncanville, TX; a Compensation Study for the City of Galveston, TX; a Compensation and Classification Study and Organizational Review of the RSMU Department for

Brazos River Authority, TX; a Compensation Study for the Montgomery County Emergency Communications District, TX; a Staffing Study for the City of Pflugerville, TX; a Compensation Study for the City of Big Spring, TX; a Comprehensive Classification and Compensation Study for the City of Odessa, TX; a Compensation and Classification Study for the City of League City, TX; a Wage and Compensation Study for Jefferson County, TX; a Classification and Compensation Study and Analysis for Waller County, TX; a Classification and Compensation Study for the City of Kingsville, TX; a Classification and Compensation Study and Analysis for Matagorda County, TX; a Compensation Study for Grand County, CO; a Compensation and Classification Study for Garfield County, CO; a Classification and Compensation Study for the City of Prescott, AZ; A Compensation Study for the City of Flagstaff, AZ: a Classification, Compensation, and Benefits Study for Yavapai County, AZ: a Classification and Compensation Study for the City of Albuquerque, NM; a Classification and Compensation Study/ Gender Pay Equity Analysis for the City of Santa Fe, NM; a Classification and Compensation Study for the City of Yucaipa, CA; a Comprehensive Compensation Study for the City of Crescent City, CA; a Consultant Services for a Study of the City's Compensation Plan and Benefits for the City of Sangar, CA; a Classification and Compensation Study for the City of Thousand Oaks, CA; a Comprehensive Classification and Compensation Study for the City of Camarillo, CA; a Classification and Compensation Study for the City of Fresno, CA; a Compensation Review for Mariposa County, CA; a Classification and Compensation Study for Inyo County, CA: a Compensation Study for the City of Bend, OR; a Professional Technical and Expert Services for the City of Portland, OR; a Classification and Compensation Study for the City of Ridgefield, WA; a Classification and Compensation Study for Jasper County, MO; a Compensation Study for the City of Jefferson, MO; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Compensation Study for the City of Fulton, MO; a Classification and Benefits Study for the City of St. Peters, MO; a Classification and Compensation Study for the City of Leawood, KS; a Comprehensive Compensation Study for Shawnee County, KS; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Compensation Study for Sedgwick County, KS; Classification and Compensation Consulting Services to the City of Clarksville, TN; a Classification and Compensation Study for Frederick County, MD; a Compensation Study for the City of Baltimore, MD; a Classification Study for Talbot County, MD; a Performance Management Study for Talbot County, MD; a Compensation Study for Allegany County, MD; a Compensation Consultation Services for Genesee County, NY; a Classification and Compensation Plan for the City of Petersburg, VA; Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Classification and Compensation Study for Loudoun County, VA; a Compensation and Classification Study for Mecklenburg County, VA; a Compensation Consulting Services for Chesterfield County, VA; a Classification and Compensation Study for the City of Norfolk, VA; a Classification and Compensation Study for the City of Falls Church, VA; a Compensation and Classification Study for Bedford County, VA; a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Comprehensive Classification and Compensation Study for the City of Fayetteville, NC; a Market Salary Survey for the City of

Rocky Mount, NC; a Classification System and Pay Plan Development Study for Franklin County, NC; a Pay and Classification Study for Dorchester County, SC; a Classification and Compensation Study for the City of Mauldin, SC; a Compensation Study for Laurens County, SC; an Organizational Assessment of the HR Department for York County, SC; a Classification and Compensation Study for the City of Rome, GA; a Classification and Compensation Study for the City of Milton, GA; a Classification and Compensation Study for the City of South Fulton, GA; a Staffing Study for the City of Fayetteville, GA; a Classification and Compensation Study for the City of Thomasville, GA; a Comprehensive Position Classification and Compensation-Benefits Study and Analysis for the City of Kennesaw, GA; a Classification and Compensation Study for Barrow County, GA; a Classification and Compensation Study for the City of East Point, GA; a Classification and Compensation Study for the City of Auburn, AL; a Compensation Study for the City of North Miami, FL; a Compensation Study for Manatee County, FL; a Classification and Compensation Study for the City of North Miami Beach, FL; a Compensation Study for the City of New Port Richey, FL; a Compensation and Classification Study for the Town of Davie, FL; a Classification and Compensation Study for Palm Beach County, FL; a Compensation Study for the City of Key West, FL; a Performance Evaluation Study for the City of Key West, FL; a Classification and Compensation Study for Okaloosa County, FL; a Compensation Study for Brevard County, FL; a Compensation Study for the City of Fort Myers, FL; a Classification and Compensation Study for Pinellas County, FL; and a Compensation Study for the City of Zephyrhills, FL.

Mr. Holcombe holds a Bachelor's Degree with a dual major in Economics and Criminology from Florida State University. He is a certified Project Managemer Professional (PMP) and holds a SHRM-SCP certification.

Project Consultant
Mr. Michael Misrahi

Mr. Misrahi is a Project Manger who has been with the firm for more than seven years. During that time, he has served as a Consultant or Project Lead on more than 100 HR consulting projects. Heh as extensive experience in the development and modification of compensation and classification plans, policies, and practices for organizations varying in size from a few dozen employees to several thousand.

Mr. Misrahi also served as the Compensation Manager at the University of Central Florida, where he oversaw a team of compensation analysts, and was responsible for administering the University's compensation structure for over 10,000 employees.

A sample of some of Mr. Misrahi's public sector projects include: a Pay for Performance and a Salary Survey for City of Mont Belvieu, TX; a Comprehensive Compensation and Benefits Study for the City of Sachse, TX; a Classification and Compensation Study for the City of Pflugerville, TX; a Staffing Study for the City of Pflugerville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; a Classification and Compensation Study for the City of Seguin, TX; a Comprehensive Compensation and Benefits Study for City of Rowlett, TX; a Wage and Compensation Study for Jefferson

County, TX; a Compensation and Classification Study for the Brazos River Authority, TX; Compensation Consultant Services to Dallas Area Rapid Transit, TX; a Salary Analysis for Fort Worth Housing Solutions, TX; a Compensation and Classification Study and Organizational Review of the RSMU Department for Brazos River Authority, TX; a Compensation and Classification Study Update for Denton County Fresh Water Supply District No. 6 and Denton County Fresh Water Supply District No. 7, TX; a Classification and Compensation Study for Ouray County, CO; a Compensation Study for Grand County, CO; a Compensation and Classification Study for Garfield County, CO; a Compensation Study for Town of Sahuarita, AZ; a Wage Compensation Study Services for Northern Arizona Intergovernmental Public Transportation Authority; a Classification and Compensation Study for the City of Prescott, AZ; Classification and Compensation Consulting Services to the City of Albuquerque, NM: an Employee Classification and Compensation Study for the City of St. Louis, MO; a Comprehensive Compensation Study for Shawnee County, KS; a Comprehensive Classification and Compensation Study for the Kentucky League of Cities; a Compensation Study for the County of Montgomery, PA; a Job Classification and Compensation Study for the City of Baltimore, MD; a Classification and Compensation Study for Frederick County, MD; a Classification and Compensation Study for Howard County, MD; Compensation, and Benefits Survey for Kent County Levy Court, DE; a Compensation Study for the County of York, VA; a Classification and Compensation Plan for the City of Petersburg, VA; a Classification and Compensation Study for Loudoun County, VA; a Classification, a Consulting Services for a Compensation Program Transition for the City of Newport News, VA; a Pay Equity Analytics Model for Fire and Police Staff for the City of Raleigh, NC; a Classification, Compensation and Benefits Study for the Town of Kiawah Island, SC; Organizational Assessment of the HR Department for York County, SC; a Compensation Study for Laurens County, SC; a Classification and Compensation Study for the City of Douglasville, GA; a Classification and Compensation Study for the City of Atlanta, GA; a Staffing Study for the City of Fayetteville, GA; a Compensation and Benefits Study for the City of St. Cloud, FL; a Classification and Compensation Study for the City of Sebring, FL; a Compensation Study for Santa Rosa County, FL; a Compensation Study for the City of Key West, FL; a Compensation and Classification Study for the City of Sarasota, FL; a Review of Compensation for the Fire Department for Sarasota County, FL; a Compensation Study for Osceola County, FL; Classification and Compensation Services for the City of Dunedin, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for the City of Doral, FL; a Classification and Compensation Study for the City of Lake City, FL; a Classification and Benefits Study for the City of Key West, FL; a Pay and Classification Study for Bay County, FL; a Compensation and ERP Study for Miami-Dade County, FL; a Pay and Classification Study for Gulf County, FL; a Compensation Study for the Tax Collector's Office of Indian River County, FL; Compensation Consultant Services for the City of Coral Springs, FL; a Salary Study for Highlands County, FL; a Compensation Study for Brevard County, FLa Compensation Study for Sarasota County, FL; a Salary and Benefits Review for Hernando County, FL; a Classification and Compensation Study for Pinellas County, FL; a Classification and Compensation Study for Palm

Beach County, FL; a Pay and Classification Study for Martin County, FL; a Compensation Study for the City of Kissimmee, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Compensation Study for the City of Fort Myers, FL; and a Compensation and Classification Study for the Town of Davie, FL.

Mr. Misrahi has an MBA and a Bachelor's degree in History from Florida State University.

Project Consultant
Ms. Kelli Bracci, CPM

Ms. Bracci, CPM, is a Senior Consultant with Evergreen Solutions. She has a Bachelor's of Science in Education from Georgia Southern University and a Juris Master from Florida State University's College of Law with a concentration in Human Resources and Legal Risk Management. She is a Certified Public Manager (CPM).

Ms. Bracci began her career working in the classroom as a teacher before transitioning to state government. After 11 years with the state, she transitioned to the private sector with Evergreen Solutions, LLC. She is experienced in classification and compensation, employee engagement, relationship management, process improvement, supervisory and leadership development, organizational change management, project coordination, and effective communication. She deeply believes that HR is integral in creating a positive culture in every organization.

A sample of some of the public sector projects that Ms. Bracci has recently been involved with include: a Compensation and Classification Study for the City of Denton, TX; a Classification and Compensation Study and Analysis for Taylor County, TX; a Compensation and Classification Study for the City of Coppell, TX; a Classification and Compensation Study and Analysis for Waller County, TX; a Classification and Compensation Study for the City of Beaumont, TX; a Compensation and Classification Study for the Woodlands Township, TX; a Classification and Compensation Study for the City of Kingsville, TX; a Compensation Study for the City of Duncanville, TX; a Compensation and Classification Study for the City of League City, TX; a Compensation and Classification Study for the City of DeSoto, TX; a Classification and Compensation Study for the City of Seguin, TX; a Classification and Compensation Study for Randall County, TX; a Classification and Compensation Study and Analysis for Matagorda County, TX; a Classification, Compensation, and Benefits Study for Yavapai County, AZ; a Classification and Compensation Study for the City of Albuquerque, NM; a Classification and Compensation Study/ Gender Pay Equity Analysis for the City of Santa Fe, NM; a Classification and Compensation Study for the City of Fresno, CA; a Classification and Compensation Study for Pleasant Valley Recreation and Park District, CA; a Compensation Review for Mariposa County, CA; a Classification and Compensation Study for Inyo County, CA; a Classification and Compensation Study for the Superior Court of California, County of Imperial, CA; a Classification and Compensation Study for the Nisqually Indian Tribe, WA; a Professional Technical and Expert Services for the City of Portland, OR; a Classification and Compensation Study for the City of Leawood, KS; a Classification and Compensation and Race/Gender Equity Study for the City of Salina, KS; a Compensation Study for Sedgwick County, KS; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Classification and Compensation Study

for the North Dakota Court System, ND; a Compensation and Classification Study for Allegany County, MD; a Classification and Compensation Study for Garrett County, MD; a Classification Study for Talbot County, MD; a Classification and Compensation Study for the Town of Strasburg, VA; a Classification and Compensation Study for the City of Falls Church, VA; a Compensation and Classification Study for Bedford County, VA; a Classification System and Pay Plan Development Study for Franklin County, NC; a Classification and Compensation Study for Jackson County, NC; a Position Classification and Revision Project for Harnett County, NC; a Classification and Compensation Study for the City of Myrtle Beach, SC; a Classification and Compensation Study for the City of South Fulton, GA; a Compensation Plan Update for the City of Garden City, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Classification and Compensation Study for Barrow County, GA; a Classification and Compensation Study for the City of East Point, GA; a Comprehensive Position Classification and Compensation-Benefits Study and Analysis for the City of Kennesaw, GA; a Classification and Compensation Study for City of Thomasville, GA; a Compensation Study for the City of Zephyrhills, FL; and a Classification and Compensation Study for Jackson County, FL; a Pay and Classification Study for Jefferson County, FL.

**Project Consultant
Mr. Peter Backhaus**

Mr. Backhaus is a Senior Consultant with Evergreen who specializes in salary benchmarking, pay plan design, and public safety markets. He focuses on delivering strategic compensation solutions tailored to meet the unique needs of each client. He has also assisted clients in developing innovative strategies and implementing best practices in classification and compensation. He has worked with a diverse range of clients across various areas of the public sector, including public utilities, public safety units, specialized service districts, transportation authorities, and general local governments.

Mr. Backhaus began his career working in sales through various markets. He quickly transitioned into a role with Verizon's most prominent partner as an account manager, focusing on business relationships and growth. Most prominently in his sales path, he joined a startup as the sales manager to lead a team through client growth and retention, while also developing outbound strategy for adopting new verticals for the company. With the startup, projected targets were exceeded, and several notable clients were guided to successful business paths. He strongly values the relationships developed with his clients and communication through all modes of life.

A sample of some of the public sector projects that Mr. Backhaus has been involved with include: a Compensation Study for City of Aransas Pass, TX; a Classification and Compensation Study for Blanco County, TX; a Classification and Compensation Study for the City of Beaumont, TX; a Compensation Study for the City of Buda, TX; a Compensation and Benefits Study for the City of Portland, TX; a Classification and Compensation Study for Waller County, TX; a Classification and Compensation Study for the City of Kingsville, TX; Compensation Benchmarking and Structure Analysis for the City of Seguin, TX; a Compensation and Classification Study for the City of Denton, TX; a Job Market Survey for New Braunfels Utilities, TX; a Classification and Compensation Study for the City of Albuquerque, NM; a Job Classification and Total Compensation Study Services for the Cosumnes

Community Services District, CA; a Classification and Compensation Study for the City of Fresno, CA; a Classification and Compensation Study for Inyo County, CA; a Compensation and Benefits Study for the Victor Valley Transit Authority, CA; a Compensation Study for the City of Bend, OR; and a Professional Technical and Expert Services for the City of Portland, OR; a Classification and Compensation Study for Culpeper County, VA; an HR Market Study for Botetourt County, VA; a Compensation and Classification Study for Mecklenburg County, VA; a Compensation Study for the Town of Central, SC; an Employee Compensation and Classification Study for the City of Greenwood, SC; a Classification and Compensation Study and Analysis for Darlington County, SC; a Compensation Study for the City of Jefferson, MO; an Employee Classification and Compensation Study for the City of St. Louis, MO; a Classification and Benefits Study for the City of St. Peters, MO; a Compensation Study and Analysis for McLean County, IL; a Classification and Compensation Study for the City of Moline, IL; a Classification and Compensation Study for Dare County, NC; a Classification and Compensation Study for Barrow County, 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 South Fulton, GA; a Classification and Compensation Study for the City of Hampton, GA; a Classification and Compensation Study and Analysis for Columbus Consolidated Government, GA; a Compensation Study for Cherokee County, GA; a Classification and Compensation Study for the City of Jackson, GA; a Classification and Compensation Study for the City of Sylvester, GA; a Classification and Compensation Study for the City of Rome, GA; a Classification and Compensation Study for the City of Eastpoint, GA; a Comprehensive Position Classification and Compensation/Benefits Study and Analysis for the City of Kennesaw, 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 Johns Creek, GA; a Classification and Compensation Study for the City of Auburn, AL; a Compensation and Benefits Study for the City of Mobile, AL; a Classification and Compensation Study for Riviera Utilities, AL; a Classification and Compensation Study for DeSoto County, FL; a Compensation Study for the City of Bradenton, FL; a Classification and Compensation Study for Boynton Beach, FL; a Comprehensive Classification and Compensation Study for Citrus County, FL; a Compensation Study for the City of New Port Richey, FL; a Compensation Study for the City of Zephyrhills, FL a Classification and Compensation Study for Okaloosa County, FL; a Classification and Compensation Study for Franklin County, FL; and a Compensation Study for the City of Flagler Beach, FL.

Mr. Backhaus has a Bachelor's of Science in Economics with Minors in Sociology and Communication.

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

Section 2.0
Methodology and Approach

2.0 Methodology and Approach

In this section, we provide you with our methodology and approach for conducting the Classification and Compensation Study for the City of Montgomery; and a detailed work plan— identifying the tasks, activities, and milestones necessary to accomplish the deliverables listed in the scope of work of the Request for Proposals.

2.1 Approach and Methodology

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

- focuses on market competitiveness;

- is based on the organization's compensation philosophy;

- recognizes that compensation is comprised of more than just base pay levels;

- reflects changes in recent compensation strategies;

- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and

- produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with the 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.

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

Kick Off Meeting

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

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

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

Communication Plan

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

Employee Orientation and Focus Groups

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

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the

project and the question-and-answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

Department Head Interviews

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

Job Assessment Tool and Management Issue Tool

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

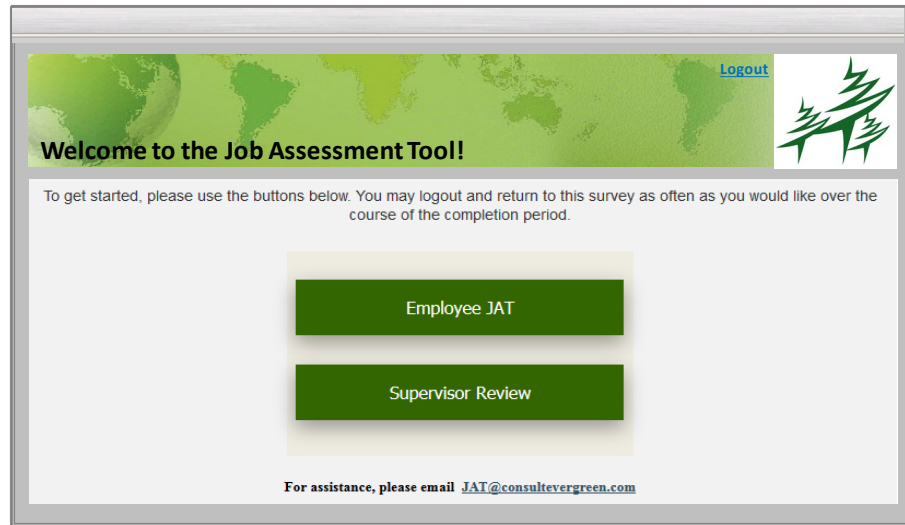The JAT contains questions that ask about each of the following areas:

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

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

Exhibit 2-1 below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.

Exhibit 2-1
Supervisor's JAT Home Screen

Logout

Welcome to the Job Assessment Tool!

To get started, please use the buttons below. You may logout and return to this survey as often as you would like over the course of the completion period.

Employee JAT

Supervisor Review

For assistance, please email JAT@consultevergreen.com

Source: Evergreen Solutions, 2024

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

Exhibit 2-2
Job Description and Responsibilities

Source: Evergreen Solutions, 2024

Exhibit 2-3 shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.

Exhibit 2-3
Job Functions

Source: Evergreen Solutions, 2024

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

Preliminary Assessment

As a starting point for analysis, Evergreen's project consultants review the client's database in comparison to the pay plan and information collected from the JATs to produce a preliminary assessment. The preliminary assessment summarizes the strengths and weaknesses of your human resource management system. The compensation analysis focuses on the number of pay grades, range widths, percentage differences between grades, step plans versus open range plans, and the expected time to reach full job competency. The overall analysis focuses on structure, movement, and equity (internal) as well as specific concerns such as turnover, longevity,

compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.

Job Evaluation

The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen's consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen's consultants will work directly with the Client Project Manager to resolve any issues.

Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.

Compensation

Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.

The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.

Market Salary Survey

A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.

Benchmarks

One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all

positions within the organization— the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

Targets

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

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

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

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

Unifying the Solution

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

The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and

other human resource models. Several major options are presented to the client's team before the implementation plan is created.

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

Compensation Administration Guidelines

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

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

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

System Maintenance

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

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

Exhibit 2-4 displays the interface from *JobForce Manager* for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report, and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

Exhibit 2-4
JobForce Manager Tool

CURRENT TITLE ▲	PAY PLAN	JAT SCORE	REGRESSION MIDPOINT	MARKET MIDPOINT	POSITION MIDPOINT (SELECT)	GRADE	MINIMUM	MIDPOINT	MAXIMUM	
Accounting Specialist II	ESP	212.5	$30,100.27	$31,220.80	$31,508.69	105	$22,702.21	$31,508.69	$40,315.17	Edit
Accounting Specialist III	ESP	281.3	$39,058.27	$34,379.43	$40,213.96	110	$28,974.42	$40,213.96	$51,453.51	Edit
Accounting Specialist IV	ESP	306.3	$42,315.73	$40,166.80	$44,335.90	112	$31,944.29	$44,335.90	$56,727.50	Edit
Accounting Supervisor	ESP	500.0	$67,561.02	$69,350.91	$68,779.53	121	$49,556.08	$68,779.53	$88,002.97	Edit
Acquisition Specialist	ESP	306.3	$42,315.73	$41,595.60	$44,335.90	112	$31,944.29	$44,335.90	$56,727.50	Edit
Administrative Aide	ESP	312.5	$43,130.09	$36,624.74	$44,335.90	112	$31,944.29	$44,335.90	$56,727.50	Edit
Administrative Recording Secretary	Professional	381.3	$52,088.10	$40,994.30	$58,245.16	212	$46,596.13	$58,245.16	$69,894.19	Edit
Administrative School Secretary I	ESP	206.3	$29,285.91	$31,619.17	$33,084.13	106	$23,837.32	$33,084.13	$42,330.93	Edit
Administrative School Secretary II	ESP	231.3	$32,543.36	$35,996.59	$34,738.33	107	$25,029.19	$34,738.33	$44,447.48	Edit
Administrative School Secretary III	ESP	256.3	$35,800.82	$37,701.80	$38,299.01	109	$27,594.68	$38,299.01	$49,003.35	Edit
Administrative Secretary I	ESP	231.3	$32,543.36	$32,190.02	$33,084.13	106	$23,837.32	$33,084.13	$42,330.93	Edit
Administrative Secretary I	ESP	206.3	$29,285.91	$32,190.02	$33,084.13	106	$23,837.32	$33,084.13	$42,330.93	Edit
Administrative Secretary II	ESP	231.3	$32,543.36	$33,919.04	$34,738.33	107	$25,029.19	$34,738.33	$44,447.48	Edit
Administrative Secretary II	ESP	231.3	$32,543.36	$33,919.04	$34,738.33	107	$25,029.19	$34,738.33	$44,447.48	Edit
Administrative Secretary III	ESP	256.3	$35,800.82	$35,971.01	$38,299.01	109	$27,594.68	$38,299.01	$49,003.35	Edit
Administrative Specialist	Professional	231.3	$32,543.36	$43,762.63	$39,422.62	204	$31,538.09	$39,422.62	$47,307.14	Edit
Administrative Specialist-School Food Services	Professional	275.0	$38,243.91	$42,861.08	$45,636.61	207	$36,509.29	$45,636.61	$54,763.93	Edit

Source: Evergreen Solutions, 2024

2.2 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Classification and Compensation Study for the City of Montgomery is provided in this section. Evergreen understands that the City has approximately 40 FTEs 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 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.

- Establish an agreeable final timeline for all project milestones and deliverables.

TASK ACTIVITIES

1.1 Discuss with the City's Project Manager and any other key personnel the following objectives:

- 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 associated departments and divisions being utilized by positions, along with related responsibility descriptions;

- current position and classification descriptions, salary schedule(s), and classification system; and

- personnel policies and procedures, including step placement policies.

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

KEY PROJECT MILESTONES

- Comprehensive project management plan

- Comprehensive database of City staff

Task 2.0 Evaluate the Current System

TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation and classification system.

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 Identify the strengths and weaknesses of the current pay plan(s) and structure for the City employees.

2.3 Identify any pay compression issues that may exist and discuss possible solutions with the CPM.

2.4 Complete an assessment of current conditions that details the nature 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)

- 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.

- 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/senior management to obtain relevant information 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 on specific compensation issues and policies.

3.4   Work with the CPM and Human Resources staff to administer the JATs and MITs to employees. Our staff utilizes a web-based tool for data collection, but we can provide paper copies as well as those for classifications without computers or Internet access. We will seek approval from the CPM before distribution of the JAT/MIT questionnaire.

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

KEY PROJECT MILESTONES

- Employee focus groups and orientation sessions

- Department head/senior management interviews

- Job assessment tool distribution

**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.

- Characterize internal equity relationships within the City.

TASK ACTIVITIES

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

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

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

4.4   Schedule and conduct additional follow-up with employees for jobs where uncertainty exists over data obtained from 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 and minimum qualifications based on results of the job evaluation (JAT) review and federal requirements.

4.7   Review all recommendations with the CPM.

KEY PROJECT MILESTONES

- Job evaluation scores by class

- Recommended classification changes

- Preliminary job structure based on internal equity

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

TASK GOALS

- Identify positions to benchmark for the market salary survey.

- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment of salary.

TASK ACTIVITIES

5.1   Identify and review with the CPM the classifications that will be used as benchmark for the market salary survey. **Note:** Evergreen will work with the CPM to select the appropriate number of classifications to use as benchmarks for the market salary survey.

5.2   Finalize the list of positions with the CPM.

5.3 Develop a preliminary list of organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as:

- size of the organization;
- geographic proximity to the Montgomery area;
- economic and budget characteristics; and
- other demographic data.

5.4 Review and finalize with the CPM up to 20 peer organizations that should be included in the market salary survey.

5.5 Develop a system for use of secondary data including 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 survey.

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

KEY PROJECT MILESTONES

- Initial list of survey peers

- Survey methodology

- Final list of survey organizations and contacts

**Task 6.0
Conduct Market
Salary and Provide
External
Assessment
Summary**

TASK GOALS

- Conduct the external labor market salary survey.

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

TASK ACTIVITIES

6.1 Prepare a customized external labor market salary survey. Discuss the questions and categories for the market survey.

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

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

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

6.5 Validate all data submitted.

6.6 Develop summary report of external labor market salary assessment results.

6.7   Submit summary report of external labor market salary assessment results to the CPM.

KEY PROJECT MILESTONES

- Market survey instrument

- Summary report of external labor market salary assessment results

**Task 7.0
Develop Strategic
Positioning
Recommendations**

TASK GOALS

- Determine the City's compensation philosophy.

- Develop a plan for employees, providing issue areas and preliminary recommendations for strategic improvement.

TASK ACTIVITIES

7.1   Identify the accepted compensation philosophy and accompanying thresholds.

7.2   Using the market salary survey data collected in **Task 6.0,** and the classification data reviewed in **Task 4.0**, recommend the appropriate pay plan(s) for the City as it relates to positions, including grade levels and ranges.

7.3   Produce a revised or new pay scale(s) that best meet the needs of the City from an internal and external equity standpoint.

KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account internal and external equity

- 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 solutions for implementation.

TASK ACTIVITIES

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

8.2 Place all classifications into pay grades based on **Task Activity 8.1**. 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 classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.

8.4 Discuss with the CPM 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

- Potential solutions

- 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 Classification and Compensation Study to the City of Montgomery.

- 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 to the City Council and senior management.

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

9.5 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports

- Final presentation

- Communication plan

Task 10.0 Develop Recommendations for Compensation Administration	**TASK GOALS**

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 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 position;

- the proper mix of pay and benefits;

- how often to adjust pay scales and survey the market;

- the timing of implementation; and

- how to keep the system fair and competitive over time.

10.2 Finalize and present recommendations to the CPM to review.

10.3 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

- Training on Evergreen's *JobForce Manager* tool

**Task 11.0
Provide Revised
Class Descriptions**

TASK GOALS

- Update existing class descriptions.

- Create new class descriptions for <u>only</u> those classifications recommended by Evergreen as a result of the job evaluation process.

- 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.

11.4   Create new class descriptions <u>only</u> for those classifications recommended by Evergreen as a result of the job evaluation process.

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

KEY PROJECT MILESTONES

- Updated class descriptions

- New class descriptions, as needed

- Recommendations for regular review of class descriptions

Section 3.0
Project Timeline and Deliverables

3.0   Project Timeline and Deliverables

Evergreen possesses the ability, staff, skills, and tools to conduct the Classification and Compensation Study for the City of Montgomery in approximately four months of the project start date and execution of a contract. Our proposed project timeline is based on a tentative start date of September 1, 2024, and a completion date of December 31, 2024.

Our proposed project timeline, as identified in **Exhibit 3-1**, can be modified in any way to best meet the needs of the City of Montgomery.

Exhibit 3-1
Proposed Project Timeline

PROJECT TASKS	2024			
	SEPT	OCT	NOV	DEC
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 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 Updated Class Descriptions				■

Section 4.0
Cost Proposal

4.0 Cost Proposal

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Classification and Compensation Study for the City of Montgomery. We are committed to providing the highest quality consulting services to our client partners for a reasonable cost. Our firm is fortunate that our overhead is minimal and our costs are reasonable so we can pass that cost 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** of our proposal is **$19,500**. Our cost is all inclusive, and includes travel cost (meals and lodging), transportation, fringe benefits, indirect cost (overhead), clerical support, and all other out-of-pocket expenses. Our cost includes two onsite visits to the City to perform the requested work as most of the work can be conducted virtually.

Our preferred payment schedule for all tasks is as follows:

- 25% - upon completion of Tasks 1 – 2
- 25% - upon completion of Tasks 3 – 4
- 40% - upon completion of Tasks 5 – 8
- 10% - upon completion of Tasks 9 – 11

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