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City of Spring Lake Park

Classification and compensation study

August 28, 2020

Contents

A. COVER LETTER	1
B. FIRM BACKGROUND	2
FIRM INTRODUCTION.....	2
NEGOTIATIONS.....	4
PROJECT TEAM	4
EXPERIENCE.....	6
C. PROPOSED WORK PLAN	14
OUR UNDERSTANDING OF SPRING LAKE PARK'S NEEDS	14
PROPOSED SOLUTION TO MEET SPRING LAKE PARK'S NEEDS.....	14
PROJECT APPROACH.....	15
PROJECT TIMELINE.....	21
D. REFERENCES	22
E. COST PROPOSAL	23
PROFESSIONAL FEE.....	23
ADDITIONAL WORK	23
F. INSURANCE	24
APPENDIX I: PROJECT TEAM RESUMES	i
APPENDIX II: SAMPLE PAQ	vi

A. Cover letter

August 28, 2020

Mr. Daniel Buchholtz
Administrator, Clerk/Treasurer
City of Spring Lake Park
1301 81st Avenue NE
Spring Lake Park, MN 55432

Dear Mr. Buchholtz:

In accordance with the City of Spring Lake Park's (the "City") request for proposals, Baker Tilly US, LLP (Baker Tilly) is pleased to submit our qualifications to conduct a classification and compensation study to update the current compensation plan for the City's employees covered by its classification and compensation program.

Our firm has assisted numerous jurisdictions throughout the United States in addressing human resources and compensation issues, as well as performing specialized management studies. We have created an extensive consulting service that provides in-depth study and analysis on a variety of management topics. In addition, Baker Tilly ensures that we have the staff, capabilities and experience required for the study the City has outlined.

Baker Tilly has developed specialized expertise in performing personnel and compensation studies and currently serves as the ongoing position classification consultant for several cities throughout Minnesota, the Midwest region and the country. We feel that this experience, coupled with our technical and human resources specialties, will bring extensive expertise to your study in the areas of human resources administration.

Included in this proposal are the qualifications of our firm, a detailed scope of services, our study methodology and a list of client references. The project's time frame is also provided, along with the resumes of the consulting team.

Very truly yours,

BAKER TILLY US, LLP



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B. Firm background

Firm introduction

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country — and internationally. As a member of Baker Tilly International, the world's 10th largest accountancy and business advisory network, we are able to extend our reach through trusted relationships with firms located across the country and throughout the world.

Baker Tilly was founded in 1931 with one central objective: to use our industry specialization to help our clients improve their businesses. For more than 85 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with Spring Lake Park as we seek to become your Valued Business Advisor.

Key facts about Baker Tilly:

- Headquartered in Chicago and employing more than 1,400 throughout the Midwest
- Provides a wide range of accounting, tax, assurance and consulting services by more than 4,000 total staff members, including 375 partners
- Ranked among the 15 largest accounting firms in the U.S.
- Serving clients with industry-focused teams

Baker Tilly has provided high quality, independent financial and management advisory services to public and not-for-profit organizations for more than 60 years. Baker Tilly's staff has been advising their clients in organizational development for more than 30 years. Baker Tilly's human capital practice group is comprised of a knowledgeable, experienced staff with direct experience in managing and leading local city and county governments. Our team of professionals brings practical, realistic and creative solutions to the challenges faced by public entities.

Our compensation consulting team is focused on position classification, compensation and performance evaluation. Our work is competitive, current, court tested and copyrighted to deliver pragmatic outcomes. Our organizational management focus ranges from human resource consulting, executive recruitment, group facilitation, strategic planning, budget analysis, resource sharing and building collaborations to organizational improvement and efficiency studies.

12th
Largest
accounting and
advisory firm in
the U.S.



50+
Offices



4,000+
Team
members



\$789.6M
FY20 revenue



B. Firm background

Public entities are under a great amount of pressure to deliver high quality services in a fiscally constrained environment. Traditional methods and means do not necessarily work anymore and this scenario is not likely to change at any time in the future. To that end, elected officials and public administrators are under pressure to employ new and innovative solutions that require progressive leadership, creative collaboration, cautious risk taking and an investment in their personnel and organizational foundation. Success in the public sector is hard to define, but those public entities that enhance and enrich their people, their process and their systems are more likely to deliver more value by maximizing the use of public resources, thus achieving more success in the marketplace of public opinion.

Since our firm's beginning, we have emerged as a leader in human resource management consulting and executive recruitment. It is our 30+ years of consulting experience, coupled with our unique approach and personal touch, which drive our internal standard for delivering only outstanding services and leading-edge products.

Project contact and location

Ann Antonsen, Director

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Why Baker Tilly is ideally suited to serve Spring Lake Park

- **Our team has successfully performed hundreds of similar studies nationwide, having been successfully implemented in governments large and small.**

Baker Tilly has been performing compensation and classification studies for more than 30 years. We have successfully implemented hundreds of studies in public organizations across the country. Our clients range from those who have as few as three employees to those who have over 3,000 employees. Our focus is on the public sector and our personnel have extensive experience in public sector pay and classification.

- **With Baker Tilly, you do not just get a study, you get a system. We train you in the system and leave you prepared to utilize it, as needed, as your workforce needs evolve.**

Upon completion of the study, Spring Lake Park will have the necessary tools to manage the classification and compensation system moving forward. As the City changes and evolves, the SAFE® job evaluation system provides the City with a tool to evaluate positions as they change or as they are created.

- **Our SAFE® classification system is solid, tested and is proven as a methodology for fairly and appropriately distinguishing and evaluating classifications**

In today's environment, organization's need to know that their methods are proven and sound. SAFE® gives you a tested methodology that works to properly differentiate between job classes in your organization.

- **We know that quality studies rest on quality data.**

To achieve this goal, we carefully identify benchmark positions for use in the study process and ensure that we collect data on a comparative basis. When the study is completed, we support our work with regression analysis to document your proposed payroll to your benchmarked competition.

B. Firm background

Overall, we pride ourselves in doing high-quality work that is defensible, transparent and fair to both the organization and its employees, as we realize that a pay and classification study is critical to your ability to maintain and grow the quality of workforce that you need to perform at the level expected by your citizenry. We proudly stand by our work and will defend and support it through adoption.

Negotiations

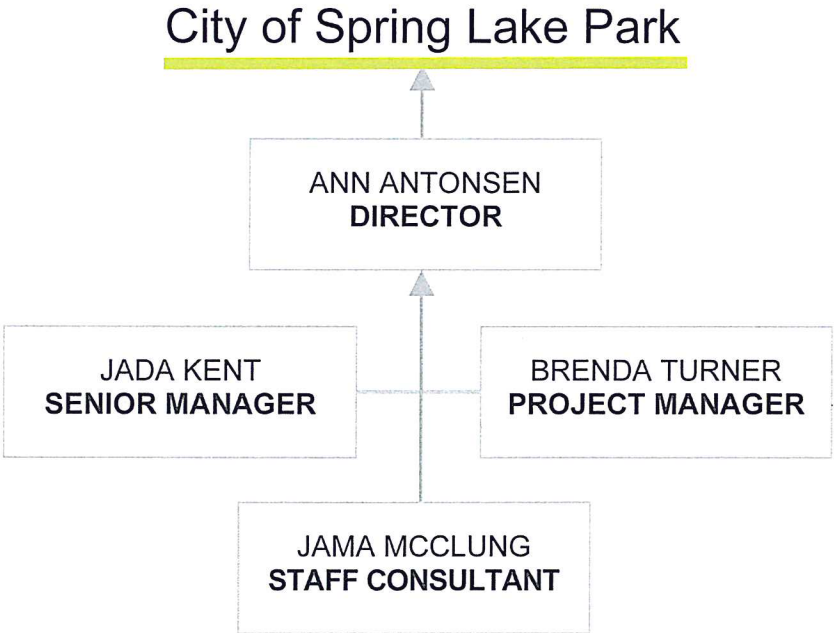
If selected, we will provide the City of Spring Lake Park with our standard engagement terms. Should the City wish to provide alternate terms or proceed on the basis of its own format agreement, we would require the ability to negotiate mutually acceptable terms and conditions prior to executing a final contract.

Project team

The Baker Tilly project team is designed specifically for the City of Spring Lake Park.

Your project team represents experienced professionals who will be working on this project. The project team is selected to meet four very specific objectives for the City: 1) It represents the staff who will be directly responsible for your projects; 2) It provides a range of expertise to cover the range of service requirements; 3) It provides a national perspective of experience and institutional knowledge to achieve your future objectives; and 4) It represents the commitment to take personal and professional responsibility for the services and outcomes for the City.

Organizational chart



B. Firm background

Project team bios

Director	Ann Antonsen
	<p>Qualifications: Ann is a consultant with a strong background in organizational management and human resources that she uses effectively in developing position analyses, classification and compensation studies, performance management and evaluation system development and staff training for the public sector. She also specializes in performing organizational studies, revising and developing personnel policies and manuals and in conducting organizational management training sessions and providing general human resources assistance. Ann has been with the firm since 2005 and earned a Bachelor of Arts in Psychology from the University of Minnesota.</p>
Manager	Jada Kent
	<p>Qualifications: Jada is a manager with a background in human capital consulting, including classification & compensation, organization management and executive recruitment. Jada has earned a master's degree in Public Administration (MPA), is a member of the North Texas Compensation Association (NTCA) and is in the process of obtaining her Certified Compensation Professional (CCP) designation. She has been with Baker Tilly since 2015.</p>
Project Manager	Brenda Turner, CCP
	<p>Qualifications: Brenda is a human capital senior associate with a background serving in compensation and human resources. Prior to joining Baker Tilly, Brenda served most recently as the senior director of global compensation for a global technology company. She has also served in varying compensation, finance and accounting roles in the hospitality, travel and technology industries. Brenda is a Certified Compensation Professional (CCP) through World at Work and is also a member of the Society for Human Resources Development (SHRM). She earned a Master of Business Administration from the University of Texas and joined Baker Tilly in February of 2020.</p>
Consultant	Jama McClung
	<p>Qualifications: Jama joined the executive recruitment team supporting Mid-Atlantic executive recruitment work in 2010. Now her specialty focus is classification and compensation studies, performance evaluations and benefits review. Jama has performed prior consulting support work as a capital project assistant for healthcare IT financial system conversions and IT infrastructure upgrades and has served as a public finance assistant, supporting senior living and healthcare public finance bankers. She attended Glenville State College and is currently completing coursework toward a bachelor's degree in Business Administration.</p>

Full Project Team Resumes can be found in [Appendix I](#).

Experience

There are a number of factors that set Baker Tilly apart from other consulting firms performing studies such as the proposed engagement for the City of Spring Lake Park.

Although we have included a lengthy list of organizations for whom Baker Tilly has provided classification and compensation services, to simplify Spring Lake Park’s evaluation process, we have augmented this list by including a brief narrative of select experience our staff provides, as well as a generalized list of outcomes consistent to our many custom compensation engagements.

- Evaluating the appropriateness of (and potentially consolidating) job titles: The assignment of job titles (including the potential for consolidation where warranted) is an integral part of each comprehensive classification and compensation study that Baker Tilly conducts. Baker Tilly provides a consistent, easy to explain and understand rationale for the assignment of job titles, which would be vital to Spring Lake Park’s success in this project given the diversity of jobs included in the scope of work.
- Analyzing extensive total compensation survey data: Baker Tilly has assigned to the Spring Lake Park project a consulting team with diverse public and private sector experience gathering and analyzing survey data. This group has extensive experience in customized classification and compensation studies for numerous organizations.
- Providing detailed implementation cost estimates: Although discussed in greater detail below, Baker Tilly has the experience and capability to guide Spring Lake Park in effective implementation costing scenarios and to prepare highly complex financial models leveraging our staff’s Microsoft Excel skillset.
- Presenting compensation results: Baker Tilly’s staff has broad experience interacting with employees at all levels in our client organizations. From executives primarily in office working environments to individual contributors in the field, we have successfully engaged employees to establish credibility in our methodology and results. Likewise, our staff has a distinct ability to present the results of compensation studies in such a way that elected officials from all walks of life can understand.



Although each engagement is different, the following are the general results Baker Tilly has achieved on behalf of our public sector clients:

- Established fair and equitable relationships among positions throughout organization (internal equity)
- Identified relevant market conditions to strategically select benchmark organizations
- Included employee input and participation to promote transparency and consistency in the job classification and compensation processes
- Developed pay structures that reflect the defensible, quantifiable alignment of positions and market competitiveness
- Maintained compliance with state and federal laws (FLSA, pay equity, for example)
- Implemented modified job classification and compensation systems within our client’s defined budget parameters

B. Firm background

Following is a partial list of Baker Tilly's previous Human Capital studies.

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2015	Amherst	VA	Pay & Class Study	2,219
2015	Appomattox River Water Authority	VA	Comp Study	
2015	Bloomington	MN	SAFE Database	86,319
2015	Bluffton	SC	Class & Comp Study	15,199
2015	Cass Lake	MN	Comp Study	747
2015	Chesapeake Bay Bridge Tunnel Dist Com	VA	Salary Update Study	
2015	Clarkfield	MN	Class & Comp Study	832
2015	Coweta County	GA	Class & Comp Study	133,180
2015	Dinwiddie County	VA	Comp Study	27,904
2015	Emporia	VA	Comp & Class Study	5,588
2015	Franklin County	VA	External Comp Study	56,335
2015	Harris County	GA	Class & Comp Study	32,663
2015	Hutchinson Utilities Commission	MN	Job Eval and Comp Syst	13,871
2015	Independent School District No. 0206	MN	Salary Study	11,580
2015	Kannapolis	NC	Class & Comp Study	44,359
2015	La Crosse Public Library	WI	Class & Comp Study	51,522
2015	Lake Geneva	WI	Comp Study	7,710
2015	Lake Worth	FL	Class & Comp Study	36,000
2015	Le Sueur	MN	Comp Study	4,041
2015	Lee County	NC	External Comp Study	60,266
2015	Lexington	NC	SAFE Training	18,993
2015	Little Falls	MN	Class Study	8,232
2015	Luray	VA	Comp Study	4,860
2015	Maple Lake	MN	Class & Comp Study	2,093
2015	Maryville	TN	Class & Comp Study	27,992
2015	Midlands Auth for Conv, Sports & Tourism	SC	Class & Comp Study	
2015	Monroe	NC	Class & Comp Study	33,975
2015	Mukwonago	WI	Comp Study	7,494
2015	New Ulm	MN	Comp Study	13,210
2015	Newnan	GA	Comp & Class Study	34,847
2015	Newport	MN	Class & Comp Study	3,461
2015	NC Assn of County Commissioners	NC	Comp & Class Study	9,944,000
2015	Orange Water and Sewer Authority	NC	Comp Study	140,352
2015	Otsego	MN	Class & Comp Study	14,254
2015	Pine County	MN	Class & Comp Study	29,104
2015	Plymouth	MN	Class Study	73,987
2015	Quin Rivers Inc.	VA	Comp Study	
2015	Red Lake Falls	MN	Comp Study	1,410

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2015	Rivanna Water and Sewer Authority	VA	Class & Comp Study	
2015	Rockbridge County	VA	Class, Comp & Perf Eval	22,307
2015	Rockingham County	NC	Class & Comp Study	91,898
2015	Rowan County	NC	Comp Plan Study	138,323
2015	Scott County Community Development Agency	MN	Class & Comp Study	137,232
2015	Sherburne County	MN	Class & Comp Study	90,158
2015	Shorewood School District	WI	Comp Study	13,337
2015	Siler City	NC	Class & Comp Study	8,169
2015	South Boston	VA	Comp Study	7,989
2015	Southampton County	VA	Class & Comp Study	18,128
2015	Warrenton	VA	Class & Comp Study	9,862
2015	Washington Housing Auth & Mid-East Reg. Housing Auth	NC	Class & Comp Study	
2015	Whitewater	WI	Class & Comp Study	14,732
2015	Wilson	NC	Comp Study	49,628
2015	Wythe County	VA	Class & Comp Study	29,344
2016	Altavista	VA	Class & Comp Study	3,490
2016	Ankeny	IA	Class & Comp Study	51,567
2016	Belle Plaine	MN	Comp Plan	6,838
2016	Bertie County	NC	Comp Study	20,344
2016	Blacksburg	VA	Comp Study	43,609
2016	Branson	MO	Class & Comp Study	11,064
2016	Cabarrus County	NC	Comp Study	187,226
2016	Cannon Falls	MN	Class & Comp Study	4,078
2016	Chapel Hill	NC	Class & Comp Study	59,635
2016	Cleveland County Water	NC	Pay & Class Study	97,047
2016	Cologne	MN	Comp Study	1,564
2016	Crosslake	MN	Class & Comp Study	2,193
2016	Dallas Area Rapid Transit Authority	TX	Comp Services	1,318,000
2016	Daniel Boone Regional Library	MO	Class & Comp Study	
2016	Dare County	NC	Class & Comp Study	35,019
2016	Eagan	MN	Class & Comp Study	65,453
2016	Eastern Shore of Virginia 911 Commission	VA	Comp Update	
2016	El Paso	TX	Class & Comp Study	674,433
2016	Gastonia	NC	Class & Comp Study	73,209
2016	Grant County	MN	Class & Comp Study	5,989
2016	Greenville Housing Authority	NC	Class & Comp Study	89,130
2016	Hibbing Housing and Redevelopment Authority	MN	Class & Comp Study	16,301
2016	Hoboken Housing Authority	NJ	Comp Study	52,575
2016	Independent School District No. 0206	MN	SAFE System	11,580
2016	Kenosha Joint Services	WI	Wage & Comp Study	99,889

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2016	Lake Zurich	IL	Class & Comp Study	19,984
2016	Lawrence Public Library	KS	SAFE Database	
2016	League of Wisconsin Municipalities	WI	Market Survey	5,779,000
2016	Louisa County Public Schools	VA	Comp Study	33,945
2016	Manassas	VA	Class & Comp Consult	41,705
2016	Moorhead Public Housing Agency	MN	Salary Study	39,398
2016	Newport News Redevelopment & Housing Authority	VA	Comp Study	182,385
2016	Nisswa	MN	Class & Comp Study	2,004
2016	Port of Corpus Christi Authority	TX	Comp & Ben Struc	316,381
2016	Rappahannock Juvenile Facility	VA	Class & Comp Study	
2016	Richmond Behavioral Health Authority	VA	Comp Update	
2016	Richmond Heights	MO	Comp & Class Study	8,508
2016	Roanoke Valley Juvenile Detention Center	VA	Salary Study	
2016	Selma	NC	Class & Comp Update	6,237
2016	Shenandoah County	VA	Salary Survey	42,684
2016	Spring Hill	TN	Class & Comp Study	32,576
2016	St. Charles City-County Library District	MO	Comp & Benes Analysis	
2016	St. Cloud Housing and Redevelopment Authority	MN	Comp Study	66,297
2016	Stevens Point	WI	Comp Study	26,670
2016	Stevens Point Area Public School District	WI	Comp Study	26,670
2016	Sumter County	FL	Comp Study	105,056
2016	Washington County Community Development Agency	MN	Class & Comp Update	251,597
2016	Willmar	MN	Comp Study	19,680
2016	Wilmington	NC	Comp Practices and Market Pay Study	112,067
2016	Winston Salem	NC	Class & Comp Study	236,441
2017	Aitkin	MN	Class & Comp Study	2,087
2017	Appalachian Regional Library	NC	Class & Comp	
2017	Association County Commissioners of Georgia	GA	Class & Comp	10,100,000
2017	Bath County Public Schools	VA	Pay & Class	
2017	Baudette	MN	Market Survey	1,073
2017	Baxter	MN	Comp Study	7,781
2017	Cabarrus County	NC	Class & Comp Study	187,226
2017	Cabarrus Health Alliance	NC	Comp Benefit Study	
2017	Caroline County	VA	Pay & Class Study	29,298
2017	Chapel Hill	NC	Comp Study & FLSA Rev	59,635
2017	Chincoteague	VA	Comp Study	2,929
2017	Cleveland County	NC	Comp & Benes Study	97,047
2017	Craven County	NC	Comp Study	103,451
2017	Dunn County	WI	Market Survey	44,122
2017	Florida Municipal Power Agency	FL	Comp Study	

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2017	Fort Wayne City Utilities	IN	Class and Comp	
2017	Harnett County	NC	Comp Study	124,987
2017	Harrisburg	PA	Class & Comp Study	49,188
2017	Hopewell	VA	Class & Comp Consult	22,163
2017	Independent School District No. 0013	MN	Job Desc/Pointing Agree	19,674
2017	Le Sueur County	MN	Market Survey	27,810
2017	Lee's Summit	MO	Comp & Benefit Study	93,184
2017	Lufkin	TX	Comp Study	36,085
2017	Meeker McLeod Sibley Community Health Services	MN	Class & Comp Study	
2017	Mendota Heights	MN	Class & Comp Study	11,222
2017	Middlesex County	VA	Comp & Class Study	10,762
2017	New Brighton	MN	Market Survey	21,867
2017	New Hope	MN	Market Survey	20,877
2017	North Mankato	MN	Anal of Comp Syst Structure	13,439
2017	Osseo	MN	Class & Comp Study	2,476
2017	Person County	NC	Phase II Implementation	39,276
2017	Pine Island	MN	Class & Comp Study	3,318
2017	Piqua	OH	Comp Study	20,906
2017	Pleasant Hill	IA	Class & Comp Study	9,082
2017	Polk County	MN	Market Survey	31,569
2017	Pulaski	VA	Class & Comp Plan	8,948
2017	RC Hospital and Clinics	MN	Class & Comp Study	
2017	Richland	WA	Class & Comp Study	53,019
2017	Roanoke County	VA	Benefits Survey	93,524
2017	Robbinsdale	MN	Comp Study	14,302
2017	Saginaw County	MI	Class & Comp	195,012
2017	Salem	VA	Class & Comp	25,483
2017	Sammamish	WA	Class & Comp Study	50,169
2017	Santa Fe	NM	Class & Comp Study	83,875
2017	Shelby	NC	Class & Comp Study	20,325
2017	Stacy	MN	Comp Plan	1,426
2017	Story County	IA	Class & Comp Study	92,406
2017	Topeka and Shawnee County Public Library	KS	Comp Study	
2017	Upper Trinity Regional Water District	TX	Comp & Class Study	
2017	Vienna	VA	Class & Comp Study	16,370
2017	Watauga County	NC	Class & Comp Study	52,372
2017	West Point Public Schools	VA	Class & Comp Study	
2017	Wyoming	MN	Market Survey	7,750
2017	Yellow Medicine County	MN	Market Survey	9,875
2018	Battle Creek	MI	Comp Study	51,833

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2018	Bemidji	MN	Comp Study	14,435
2018	Blue Springs	MO	Pay Plan Design	53,294
2018	Bonner Springs	KS	Comp and Class Study	7,665
2018	Broad River Water Authority	NC	Class and Comp Study	
2018	Burnsville	MN	Class and Comp Study	61,290
2018	Carver	MN	Comp Study	4,628
2018	Cleveland County	NC	SAFE Database	97,047
2018	Cloquet	MN	Comp Plan Update	12,050
2018	Craven County Schools	NC	Comp Study	
2018	Dallas Area Rapid Transit Authority	TX	Comp Study	
2018	Dayton	VA	Class and Comp Study	1,609
2018	DeSoto	TX	Class and Comp Study	52,599
2018	Dinwiddie County Schools	VA	Review of Compensation Study	
2018	Elko New Market	MN	Pay Equity Report	4,513
2018	Eudora	KS	Class and Comp Study	6,211
2018	Grain Valley	MO	Class, Comp & Benes Study	13,125
2018	Harris County Housing Authority	TX	Salary/Wage Comparability Study	
2018	Housing Authority of the Durham	NC	Salary Comparability Study	263,016
2018	Ingleside	TX	Class & Comp Study	10,488
2018	Intermediate School District No. 917	MN	Job Description Updates/Training	
2018	Johnson County	IA	Comp and Class Study	144,251
2018	Lakeville	MN	Class & Comp Study	58,562
2018	Laurinburg	NC	Class & Comp Study	15,774
2018	Leavenworth	KS	Comp Study	35,891
2018	Mansfield	CT	Class & Comp Study	25,959
2018	Minnehaha Creek Watershed District	MN	Class and Comp	
2018	Minnehaha Creek Watershed District	MN	Class and Comp Study	
2018	Minnehaha Creek Watershed District	MN	Pay Equity Report	1,124,000
2018	Minnetonka	MN	Class & Comp Study	51,638
2018	Northwest Regional Library	NC	Class & Comp Study	
2018	Person County	NC	Phase III C&C Implementation services	39,276
2018	Rappahannock Regional Jail	VA	Comp Study	
2018	Scott County Community Development Agency	MN	Pay Equity Report	137,232
2018	Thibodaux	LA	Market Study	14,566
2018	Verona	WI	Market Survey	10,632
2018	Wabasha Soil and Water Conservation District	MN	Class Study	
2018	Willmar	MN	Comp Study	19,680
2018	Winston Salem	NC	Class & Comp Study-Phase II	236,441
2018	Wright Soil & Water Conservation District	MN	Class and Comp Study	
2019	Adams County	WI	Class & Comp Study	19,973

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
2019	AppalCART	NC	Class & Comp Study	
2019	Bellingham	WA	Comp Market Study	89,045
2019	Brooklyn Center	MN	Comp Study	30,712
2019	Capital Region Water	PA	Class & Comp Study	
2019	Circle Pines	MN	Comp & Class Study	4,978
2019	Council Bluffs	IA	Class & Comp Study	62,316
2019	Dallas Housing Authority	TX	Comp Study	
2019	Fillmore Soil & Water Conservation District	MN	Class & Comp Study	
2019	Gastonia	NC	Class & Comp Study	75,536
2019	Gatesville	TX	Class & Comp Study	12,387
2019	Independent School District No. 2769	MN	Job Desc/Pay Equity Review	
2019	Intermediate District 0287	MN	Pay and Class	
2019	Iowa League of Cities, Des Moines	IA	Comp Study	3,146,000
2019	King County Housing Authority	WA	HR Management Consulting	
2019	Local Government Information Systems	MN	Comp & Benefit Study	
2019	McFarland	WI	Market Survey	
2019	Montgomery	MN	Class & Comp Study	2,907
2019	Morehead City	NC	Class & Comp Study - Maintenance	9,203
2019	North Central Regional Library	WA	Comp & Benefits Study	
2019	Payson	AZ	Class & Comp Study	15,476
2019	Pittsylvania County	VA	Comp Study	62,426
2019	River Falls	WI	Class & Comp Study	15,510
2019	Rocky Mount	VA	Comp Study	4,798
2019	Saginaw County	MI	Class & Comp Phase II	195,012
2019	Saginaw County	MI	Class & Comp Phase III	195,012
2019	Salem	VA	Class & Comp	25,483
2019	Sartell	MN	Class & Comp Study	13,917
2019	Scandia	MN	Class & Comp Study	4,120
2019	St. Charles City-County Library District	MO	Market Study	
2019	Stutsman County	ND	Comp Study	
2019	Tyler	TX	Class & Comp Study	104,991
2019	Wheaton	IL	Market Survey	53,373
2019	Wright County	MN	Class & Comp Study	131,311
2019	Zimmerman	MN	Comp Study	5,499
2020	Rappahannock County	VA	Comp & Class Study	7,321
Current	Crystal	MN	Comp Study	22,463
Current	Elko New Market	MN	Pay Plan Update	4,760
Current	Fertile	MN	Class & Comp Study	833
Current	Fosston	MN	Class & Comp Study	1,481
Current	Horicon	WI	Class & Comp Study	3,595

B. Firm background

List of relevant projects: 2015 – present

Year	Client	State	Project	Population
Current	Independent School District No. 0625	MN	Principal Wage Study	
Current	Onalaska	WI	Class & Comp Study	18,712
Current	Otsego	MN	Comp Study	17,357
Current	Richmond	IN	Comp Study	35,353
Current	Traverse County	MN	Class & Comp Study	3,308
Current	Waite Park	MN	Comp Study	7,718
Current	Windsor	VA	Class & Comp Study	2,626

C. Proposed work plan

Baker Tilly is uniquely positioned to assist the City of Spring Lake Park to ensure an equitable, competitive classification/compensation system is in place that supports its mission of competent, expeditious, courteous and cost-effective services.

Our understanding of Spring Lake Park's needs

Baker Tilly will conduct a comprehensive classification and compensation study and analysis for the City's approximately 20 positions (approximately 31 full-time and two part-time employees). Baker Tilly will assist the City in the review and analysis of the current job classification and compensation system, conducting a comprehensive market survey, evaluating internal equity and recommendations for improvements to the existing system or development of a new system which meets the goals established by the City of Spring Lake Park. The proposed system will be understandable and explainable to administration, elected officials, employees and citizens and can be maintained by the City. The system will allow the City of Spring Lake Park to recruit and retain quality, qualified employees and will be competitive with comparable organizations. The system Baker Tilly will develop will:

- Establish fair and equitable compensation relationships between positions within the City
- Reflect relevant market conditions outside the organization
- Apply to all City positions professionally, consistently and objectively
- Include employee input and participation as an integral part of the study process
- Provide a strategic plan for implementation and ongoing maintenance in accordance with best practices

Proposed solution to meet Spring Lake Park's needs

Baker Tilly would value the opportunity to assist the City of Spring Lake Park with its classification and compensation study. Our experience working with other comparable government entities in Minnesota and around the Twin Cities metro area gives us a thorough understanding of the scope of the study that the City is seeking.

The services to be provided by Baker Tilly include:

- Meetings conducted with administration, department heads and other relevant staff to gain an understanding of the needs and expectations of the City, and to collect information on the City and department structure, operations and staffing
- Conduct employee orientation meetings; employees and supervisors complete Position Analysis Questionnaires (PAQs)
- Analyze and update job descriptions
- Evaluate positions to determine internal comparability of City positions
- Determine FLSA status of City positions

C. Proposed work plan

- Develop and conduct a comprehensive salary and benefits survey of comparable organizations selected in conjunction with the City. Survey information is requested directly from the selected participants. Baker Tilly does not rely on published survey information for public sector participants; this information is used to supplement information collected directly from the selected survey participants. We will use a variety of resources to collect relevant private sector information. Summaries of City positions are included in the survey instrument to ensure comparability of positions.
- Provide recommendations for revisions to the City's current compensation plan, including options for implementation based on the City's financial resources that will enable the City to recruit and retain qualified employees, is competitive in the established market, eliminates compression and ensures fair and equitable internal compensation of City positions
- Provide a manual and training of key City employees on maintaining the classification and job evaluation system and the compensation plan, how to place new positions within the classification, evaluation and compensation system and how to ensure the system remains internally equitable and competitive with the City's established market
- Presentation of study findings and final report to the City

The manner in which we approach a project takes into consideration two key variables: *process credibility* and *outcome credibility*. Process credibility is the realization to all involved, in particular City staff, that the methodology used is credible, reasonable and fair to all concerned. In addition, the information and communication must be transparent, honest and timely. Outcome credibility is the realization that the information and data used to develop the findings and conclusions is comprehensive, complete and applied consistently and appropriately without bias or preference to any particular person, persons or individual agenda. If these two objectives are realized, the recommendations, outcomes and future implementation are based on a solid foundation. This distinction is unique in our business and is a contributing factor to the benefits and strengths of the Baker Tilly team.

In summary, extensive expertise, human capital consulting experience and a collaborative approach positions Baker Tilly as the logical choice to serve your City's needs.

We are confident that you will find our assertions substantiated by the information presented in this proposal and the comments provided by our references. We look forward to a successful and lasting relationship.

As described in this proposal and outlined below, Baker Tilly is an ideal candidate for meeting your needs. Choose Baker Tilly and you will be joining forces with a strategic ally with vast experience in collaboration with clients. We offer the requisite depth of experience, knowledge and skills to effectively meet the City's needs. Spring Lake Park will receive a solution tailored to your needs and objectives from our collaborative process.

Project approach

Baker Tilly is pleased to submit this proposal to conduct an analysis of the City of Spring Lake Park's classification and compensation system. A compensation study was conducted in 1999. Adjustments for the City's positions have been made from time to time. Baker Tilly will conduct a comprehensive classification and compensation study for the City's 20 full and part-time positions, including both union and non-union positions.

C. Proposed work plan

Facilitating union and non-union involvement is one of the most important components in the development of a compensation system. This is a seamless practice for us and we have this issue – almost universally – in every project we are involved with in Minnesota. As discussed in this proposal, our approach emphasizes process credibility and outcome credibility. When these two variables are achieved, potential union and non-union conflicts are minimized and essentially eliminated.

In our study approach, input is obtained from both union and non-union employees equally, without bias or preference to any individual, classification or bargaining unit. Also, union representatives are invited to attend the employee orientation meeting to obtain information regarding the study. In our experience, we have consistently and successfully managed union and non-union issues and received buy-in from all employees. We treat each individual respectfully and equally. We will work to build trust with everyone we work with in Spring Lake Park.

The proposed project approach and study methodology are outlined below. The scope of services, tasks and staffing necessary to successfully complete this project are discussed in subsequent sections of this proposal. The project approach was developed to include employee and management involvement and communication as requested by the City of Spring Lake Park. Baker Tilly is willing to adjust any aspect of this study to respond to the City's needs.

Project initiation

The Baker Tilly project director will meet with the designated City staff and appropriate officials to establish working relationships and to finalize a comprehensive work plan and timetable. At these meetings we will request that the designated project manager provide us with the background materials necessary to conduct this study, including current job descriptions, classification and compensation documents, a copy of each labor agreement currently in effect, the City's personnel policies, fringe benefit information and other relevant data. This information will be evaluated to determine the status of existing human resource management programs and to identify apparent issues and opportunities. The purpose of the meeting(s) is to:

- Introduce the project director and the consulting team
- Discuss the background and experience of Baker Tilly and the consulting team
- Discuss, in detail, the methodology to be used in conducting the study, the role of the consulting team, management and the employees, and the amount and type of employee participation
- Ascertain the major issues the City wants the study to address
- Review the project schedule and determine significant milestones
- Determine the frequency and content of status reports
- Discuss methods of communicating the status of the study to employees

Baker Tilly will also meet individually with department heads to become familiar with department structure and service levels, hiring and retention issues, any concerns with the current compensation plan and any other issues that may need to be addressed during the study

Data collection

Employees play a major role in providing the data needed for this study. Therefore, it is imperative that employees receive information about the study and why it is being conducted, be given opportunities for employee involvement throughout the process, learn the expected outcomes, as well as have an opportunity to ask questions and express concerns.

Baker Tilly will conduct employee informational meetings to introduce the study, explain study procedures and answer any questions employees may have about the process. These meetings will be scheduled and conducted to ensure that all employees have an opportunity to attend and so as not to disrupt the operations of the City.

Employees will be introduced to our Position Analysis Questionnaire (PAQ) at this time. The questionnaire provides an opportunity for each employee to provide input on education, training, certifications, licenses and experience requirements of the position and provide input on the various job factors which apply to their position. Employees will also identify the specific physical requirements and working conditions of their position to assist in the consultant's review for compliance with the Americans with Disabilities Act (ADA). Employees will also be asked to review the current job description for their position and provide information for any required changes in essential functions or required knowledge, skills and abilities. Baker Tilly will spend time at the meeting reviewing the PAQ and responding to employee questions. The information gathered from the PAQs will provide the information to be used during the job evaluation process and, along with the City's updated job descriptions, to assist in gathering wage data from comparable organizations. Baker Tilly will also review each position's designation under the Federal Fair Labor Standards Act (FLSA). During the informational meeting(s), we will also explain the supervisors' roles in completing and signing off on the PAQs and reviewing and providing input for changes to current job descriptions. The questionnaire is designed to allow supervisors to comment on employee responses without altering employee responses. This allows the consultant to review complete, unedited responses from employees and supervisors. In instances where the employee and supervisor view the position requirements differently, Baker Tilly will conduct job audits (as necessary) to obtain more information. Audits will be scheduled to minimize disruption to City operations. If necessary, meetings can be scheduled at the beginning or end of a shift to facilitate employee attendance.

A sample PAQ is provided in [Appendix II](#).

Market Survey

In order to determine appropriate salary levels of positions in the workforce and address the issue of comparable compensation, Baker Tilly will conduct an extensive salary and benefits survey to compare City positions with analogous positions in other comparable agencies in the area labor market. By gathering and analyzing information on wages, wage equivalents and benefits, a comparison of total compensation can be reviewed in comparison to the City's established market area. External market comparisons for positions will be based on similar organizational structure, population, geographic location, job responsibilities, scope of authority, financial, socio-economic, growth and other relevant factors. The study team will consult with the City management and designated staff in identifying the appropriate sources of survey data, which will include public and private sector organizations. Baker Tilly will develop the salary survey in conjunction with the City.

It is recommended that potential survey data pertain to organizations comparable to the City, relate to those organizations with which the City is competing for employees and represent the appropriate labor market.

C. Proposed work plan

There are different labor markets for positions. Some positions are recruited from the local area, while others are recruited regionally and/or nationally. The consulting team will work closely with the staff in determining the appropriate labor market for positions.

Job evaluation and development of pay plan

While salary survey data will assist the City in establishing its position in the competitive market, job evaluation is the mechanism that ensures that internal relationships are equitable. Baker Tilly has developed and copyrighted a job evaluation system known as *Systematic Analysis and Factor Evaluation* (SAFE®) system. The SAFE® system is a unique job evaluation method designed to measure job factors which apply specifically to local government. This system has been successfully used for many years throughout the country and has been reviewed by the United States District Court in conjunction with an Equal Employment Opportunity (EEO) suit and found acceptable to the Court.

The system rates and ranks jobs based on various skill levels and work factors. The result is an equitable and consistent method of evaluating jobs and relating positions to the compensation plan. The system facilitates proper and equitable comparisons between and among positions and minimizes the appearance of favoritism in evaluating, rating and ranking jobs.

The elements considered in determining the relative value of classifications are:

- Training and ability
- Level of work
- Physical demands
- Independence of actions
- Supervision exercised
- Experience required
- Human relations skills
- Working conditions/hazards
- Impact on end results

This system can be maintained by the City. Baker Tilly provides training to individuals assigned by the City to this task on utilizing the SAFE® system to evaluate newly created positions and re-evaluate revised positions.

Based on the wage and benefits data analysis and the job evaluation system, Baker Tilly will develop a recommended compensation plan. The plan will be developed in accordance with information obtained from the City regarding its pay philosophy as well as goals and objectives established for its compensation program, including the option for a performance based component. In the development of the proposed compensation plan, Baker Tilly will attempt to equal the market rate for all positions and identify any deviations from the market rate in writing in the Final Report prepared for the City. Baker Tilly will review options with the City to address compensation plan structure, the spread for pay ranges, the relationship between ranges and adjustments needed to ensure that the City remains competitive with the labor market.

Development of Spring Lake Park's compensation policy

A pay philosophy guides the design of a compensation system and answers key questions regarding pay strategy. It generally takes a comprehensive, long-term focus and explains the compensation program's goals and how the program supports the employer's long-range strategic goals. Without a pay philosophy, compensation decisions tend to be viewed from a short-term tactical standpoint apart from the organization's overall goals.

Market competitiveness and internal equity are among the most important areas addressed in a pay philosophy. An organization's desired market position involves defining the market and identifying where the organization wants to be positioned within that market. Market position should balance what it takes to attract new employees and retain skilled employees (in other words, eliminate higher pay as the reason employees leave the organization) with the organization's financial resources. Internal equity expresses an organization's desire to provide comparable pay to positions with comparable duties and responsibilities.

A pay philosophy should be developed that establishes a compensation program based on individual employee performance as a key feature of the pay philosophy. Therefore, we emphasize references to performance in the pay philosophy discussion. As part of the study, it is recommended that the City consider these concepts in the adoption of a formal pay philosophy:

- Providing fair and equitable rates of pay to employees
- Defining the City's market area
- Developing a system that establishes a "market rate" for each position and states the minimum wage and maximum rates that the City will pay individuals within a position
- Establishing rates of pay that allows the City to compete successfully for new employees within its market area
- Establishing a market position that is fiscally responsible with public resources
- Ensuring that pay rates for existing employees are based on individual performance that meets or exceeds expectations and reflects changing economic conditions
- Developing a compensation system that allows employees to progress through the pay range as long as their performance consistently meets expectations
- Developing pay administration policies and procedures that ensure their consistent application between departments
- Ensuring that the compensation program is understandable to employees, supervisors, managers, the City officials and the public

Employee communications

Baker Tilly will develop a communications strategy to inform employees of job evaluation and pay grade assignments. Employee communications will be developed explaining the study methodology, employee input opportunities, study recommendations and the process used for reviewing requests for reconsideration by employees who do not agree with the assigned classification. The consultant will participate in the review of employee requests for reconsideration.

Implementation strategy

At the conclusion of the study, Baker Tilly will work with the staff in developing a plan for implementing the study recommendations. The plan will coincide with the needs of the City and the employees while maintaining the City's financial integrity. An estimate of the cost of implementation will be provided.

Staff training

At the conclusion of the study, Baker Tilly will train members of the staff in the methodology used to develop, maintain and update all aspects of the classification and compensation plan and how to determine the validity of requests for reclassification. The training program will include the rating, ranking and salary grade assignments of positions. Instruction manuals pertaining to the job evaluation system will be prepared and presented. The Baker Tilly team will remain available to the staff for additional consultation after the study has been completed.

Final report

The final report will be a document that contains the following:

- Detailed study methodology
- Discussion of the consulting team's findings, conclusions and recommendations regarding employee classification, salary structure, compensation philosophy, fringe benefits, compensation plan, estimated cost and implementation plan
- List of positions and the assignment of each to the compensation plan
- FLSA Status recommendations for all positions
- Salary and benefits survey results
- Job evaluation factor analysis for each position

Post contract maintenance

Baker Tilly Incorporated can provide ongoing assistance to clients after completion of a classification and compensation study. Post-contract maintenance services include assisting Spring Lake Park with assignment of positions to the classification plan, determining the FLSA status of a new or revised position and conducting job evaluations for reclassification requests and new positions created by the City.

Project timeline

Baker Tilly takes pride in meeting its time commitments.

The schedule to commence this project coincides with Baker Tilly's completion of other studies. This will ensure that the proposed staff members will be available to concentrate on this study. Baker Tilly is prepared to initiate the study within three weeks after receiving the official notice to proceed and will complete the study within six months. It is anticipated that Baker Tilly team members will spend approximately 50 hours on the project during the various phases. A detailed project timeline is provided below.

There are factors that impact upon meeting the schedule that are beyond the consulting team's control. The proposed time frame is contingent upon a timely decision, the receipt of requested data, and the timely receipt of feedback and comments on the submitted preliminary data.

City of Spring Lake Park Classification and Compensation Study

Activity	Target Date
- Authorization to proceed	September 8, 2020
- County completes initial data request	September 15, 2020
- Initial planning meetings and employee communications	Week of September 21, 2020
- Electronic PAQ distributed	Week of September 21, 2020
- PAQ due to next-level supervisor for review	October 2, 2020
- PAQ due to Baker Tilly	October 9 2020
- Baker Tilly distributes salary, benefits and pay practices survey to benchmark organizations	Week of October 26, 2020
- Market survey due date	November 13, 2020
- Baker Tilly prepares draft salary structures and compiled salary survey results	November 30, 2020
- Baker Tilly prepares modified salary structures (as necessary, based on City feedback) and approximate implementation costs	December 14, 2020
- Baker Tilly submits final report and works with City to schedule final report presentation	January 6, 2021

D. References

The following references are for projects that Ann Antonsen, proposed project director for the City of Spring Lake Park engagement, recently completed.

The following references will attest to Baker Tilly's ability to leverage our proven classification and compensation methodologies, tailor them to fit specific needs and concerns, and provide actionable implementation plans that consider the current and future situation of our clients.

City of Burnsville, Minnesota

Name	Jill Hansen	Title	Human Resources Director
Phone	(952) 895 4471	Email	jhansen@burnsvillemn.gov
Address	100 Civic Center Parkway, Burnsville, MN 55337		
Services	Comprehensive classification and compensation study		

Town of Farragut, Tennessee

Name	Janet Curry	Title	Human Resources Manager
Phone	(865) 966 7057	Email	jcurry@townoffarragut.org
Address	11408 Municipal Center Drive, Farragut, TN 37934		
Services	Comprehensive classification and compensation study; market survey; on-going support; and compensation plan update (current)		

City of Waite Park, Minnesota

Name	Shaunna Johnson	Title	City Administrator
Phone	(320) 252 6822	Email	shaunna.johnson@ci.waitepark.mn.us
Address	19 13 th Avenue North, Waite Park, MN 56340		
Services	Comprehensive classification and compensation study; market survey; on-going support; and compensation plan update (current)		

E. Cost proposal

Professional fee

Baker Tilly will perform all the tasks delineated as described in this proposal for a professional fee of **\$10,500**, including expenses. This fee is based on 20 positions, one employee orientation session as well as required meetings with administration, three implementation options and associated work outlined in this proposal. This proposal includes up to three on-site visits by the project manager subject to the City and/or Baker Tilly precautionary travel and personal contact measures in place due to COVID-19, for the safety of all employees. Baker Tilly maintains systems to facilitate virtual meetings for all study phases.

Baker Tilly would invoice the City for work completed based on the following schedule:

Time of Invoice	Percentage Invoiced	Cumulative Percentage
Completion of project initiation (or employee orientation)	25%	25%
Completion of Position Analysis Questionnaires	25%	50%
Distribution of Comprehensive Market Survey	20%	70%
Completion of draft pay structure(s) or pay structure updates	20%	90%
Completion of final report	10%	100%

Additional work

Should the City of Spring Lake Park request and authorize additional work, we would invoice the City at an agreed upon fee or our standard hourly fees. Additional Implementation Plans will be billed at a cost of \$500/plan. In addition, we would charge, at cost, for any related out-of-pocket expenses.

Title	Hourly Rate
Principal, Partner, Firm Director	\$300
Senior Manager, Director	\$260
Manager, Senior Staff	\$215
Staff	\$160
Support	\$75

Additional work would include work outside the scope of services as agreed to including, but not limited to:

- Additional position descriptions
- Additional reports
- Additional job audits
- Work related to a special request
- Additional on-site meetings

F. Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/01/2019

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

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

PRODUCER Aon Risk Services Northeast, Inc. One Liberty Plaza, 165 Broadway, Suite 3201 New York, N.Y. 10006	CONTACT NAME:	
	PHONE (A/C, No., Ext):	312-381-1000
	FAX (A/C, No.):	312-381-7007
	E-MAIL ADDRESS:	
INSURER(S) AFFORDING COVERAGE		NAIC #
	INSURER A:	Columbia Casualty Company
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability Insurance			ABF-188122608	01-Oct-19	01-Oct-20	Not less than US\$5,000,000 per claim and in the annual aggregate.

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

CERTIFICATE HOLDER Baker Tilly Virchow Krause, LLP Ten Terrace Court Madison, WI 53718	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Aon Risk Services Northeast, Inc.</i>
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Appendix I: project team resumes

Ann Antonsen

Ann Antonsen, a director with Baker Tilly, has been with the firm since 2005.



Baker Tilly US, LLP
Director
 380 Jackson Street
 Suite 300
 Saint Paul, MN 55101
 United States

T +1 (651) 223 3057
M + 1 (612) 382 4491
ann.antonsen@bakertilly.com
 bakertilly.com

Education
 Bachelor of Arts, Psychology
 University of Minnesota – Minneapolis

Ann is a consultant with a strong background in organizational management and human resources which she uses effectively in developing position analyses, classification and compensation studies, performance management, evaluation system development and staff training for the public sector. She is dedicated to using her well-honed abilities to assist governmental agencies in developing and growing meaningful legacies

Specific experience

- Performs organizational assessments and studies, revises and develops personnel policies and manuals and conducts organizational management training and provides general human resources assistance
- Strong background in organizational management and human resources
- Experience serving government organizations
- Provides human resources management services for large suburban communities and regional centers
- Human resources experience in both public associations and private corporations

Industry involvement

- International Public Management Association in Human Resources (IPMA)

Jada Kent

Jada Kent, a manager at Baker Tilly, has been with the firm since 2015.



Baker Tilly US, LLP
Manager
 2500 Dallas Parkway
 Suite 300
 Plano, TX 75093
 United States

M +1 (940) 368 3033
jada.kent@bakertilly.com
 bakertilly.com

Education
 Master of Public Administration (MPA)
 University of Texas – Dallas

 Bachelor of Arts, U.S. History
 University of North Texas (Denton, TX)

Jada is a Human Capital Manager, experienced in providing comprehensive classification and compensation services to public sector organizations. Prior to this role, she provided other human capital consulting services within Baker Tilly such as organization management and executive recruitment. Before joining Baker Tilly, Jada served in the United States Army and the Texas Air National Guard, respectively, as a Public Affairs Specialist.

Specific experience

- Point factor job evaluation, job classification, FLSA review, market pricing and analysis, base pay structure design, job description development and project implementation
- Experience working with clients in Connecticut, Florida, Iowa, Indiana, Michigan, Missouri, Minnesota, New Hampshire, New Mexico, North Carolina, Ohio, Oregon, Pennsylvania, Texas and Washington
- Experience working with the following types of organizations: City, County, Judicial Branch, Power Agency, State Legislature, State Municipal Association, Transportation Authority and Water/Wastewater Authority

Industry involvement

- North Texas Compensation Association (NTCA)

Continuing professional education

- Certified Compensation Professional (CCP) – *in progress*

Brenda Turner, CCP

Brenda Turner, a project manager with Baker Tilly, recently joined the firm in 2020.



Baker Tilly US, LLP
Project Manager
 2500 Dallas Parkway
 Suite 300
 Plano, TX 75093
 United States

M +1 (214) 543 3383
brenda.turner@bakertilly.com
 bakertilly.com

Education

Master of Business Administration
 University of Texas (Dallas, Texas)

Bachelor of Business Administration
 Dallas Baptist University (Dallas, Texas)

Brenda is a project manager on the human capital team. She is experienced in providing compensation design, implementation and program management services in a variety of industries. Before joining Baker Tilly, Brenda served in compensation leadership and analyst roles in the airline and technology industries. She has also served in finance and accounting roles in the hospitality and technology industries.

Specific experience

- Compensation structure design and implementation, including market-based and point factor approaches
- FLSA and internal pay equity analysis and implementation
- Job documentation and job description development and publication
- Base salary, short term and long term incentive design and program management
- Executive compensation VP to C-Suite to CEO program design and management
- Organization transactions (M&A, IPO, Private Equity)
- Compensation management technology design, implementation and administration

Industry involvement

- World at Work (WAW)
- Society for Human Resource Management (SHRM)

Continuing professional education

- Certified Compensation Professional (CCP)

Jama McClung

Jama McClung, a consultant with Baker Tilly, has been with the firm since 2010.



Baker Tilly US, LLP
Consultant
 9097 Atlee Station Road
 Suite 200
 Mechanicsville, VA 23116
 United States

T +1 (804) 622 6991
jama.mcclungl@bakertilly.com
 bakertilly.com

Education
 Coursework completed
 Glenville State College (Glenville, West Virginia)

Currently completing coursework toward a bachelor's degree in Business Administration

Jama joined Baker Tilly as part of the executive recruitment team. She now works as a consultant with the human capital team specializing in classification and compensation studies, performance evaluations and benefits review.

Specific experience

- Specialty focus is classification and compensation studies, performance evaluations and benefits review
- Performed prior consulting support work as a capital project assistant for healthcare IT financial system conversions and IT infrastructure upgrades
- Served as a public finance assistant supporting senior living and healthcare public finance bankers

Appendix II: sample PAQ



now joined with
Springsted and Umbaugh

Baker Tilly Virchow Krause, LLP
380 Jackson Street, Suite 300
Saint Paul, MN 55101-2887

Tel: 651-223-3000

Fax: 651-223-3002

www.bakertilly.com

Instructions for Completing Your Position Analysis Questionnaire

Please read these instructions before completing your Position Analysis Questionnaire (PAQ). This form is used to obtain information about your position. The questionnaire consists of multiple-choice and fill-in-the-blank questions; please be clear, accurate and complete. For multiple-choice questions, please check only the appropriate box on the left-hand side of the document; the right-hand box is for your supervisor or department/division head to complete; **check only one box per question, except for question 20 and the American with Disabilities Act section. Please complete and return the PAQ to your supervisor.**

Tips for Completing Your PAQ

- Spell out acronyms – acronyms may be exclusive to your department and mean something else nationally or to another part of the organization
- Minimum Requirements – Answer the questions based on the minimum requirements needed to perform the duties of the position (you may have 10 years of experience, but would a new hire need that to do the job?).

TO: Supervisors and/or Division/Department Heads

SUBJECT: **Instructions for Completing Position Analysis Questionnaire**

After the employee or group of employees under your day-to-day supervision has completed a PAQ, they should return them to you for your review and verification. You will want to check the appropriate boxes on the right-hand side of every page, either agreeing or disagreeing with the boxes the employee has checked on the left-hand side. There is a section on Page 5 where you can comment on the accuracy and completeness of the employee's response. Please note any comments in this section and do not make any changes to employee responses.

Position Analysis Questionnaire

1. Name(s) <i>(Last, First)</i>	2. Current Position Title	3. Current Annual Salary																										
4. Immediate Supervisor's Title	5. Department/Division	6. Date of Hire with Agency																										
7. How many hours are you scheduled to work in a week? <input type="checkbox"/> 35 <input type="checkbox"/> 37.5 <input type="checkbox"/> 40 <input type="checkbox"/> 43 <input type="checkbox"/> 56 <input type="checkbox"/> Other	Explain shift rotation, stand-by, call back, etc.	8. Date of Hire in Position																										
<p>9. Education and Experience - Please indicate the <u>minimum</u> education and <u>minimum</u> experience level needed to complete the normal, day-to-day tasks:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 60%;"><i>Employee (check one)</i></td> <td style="width: 40%; text-align: right;"><i>Supervisor (check one)</i></td> </tr> <tr> <td><input type="checkbox"/> Less than High School Diploma or GED.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> High School Diploma or GED.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Associates Degree.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Bachelors Degree.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Masters Degree.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> PhD.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Other.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> </table> <p>Major/Coursework: _____</p> <p>Type of Experience _____</p> <p>Years of Experience</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> No experience.....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Less than one year (minimal).....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> One to three years (moderate).....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Three through five years (considerable).....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/> Six or more years (extensive).....</td> <td style="text-align: right;"><input type="checkbox"/></td> </tr> </table>			<i>Employee (check one)</i>	<i>Supervisor (check one)</i>	<input type="checkbox"/> Less than High School Diploma or GED.....	<input type="checkbox"/>	<input type="checkbox"/> High School Diploma or GED.....	<input type="checkbox"/>	<input type="checkbox"/> Associates Degree.....	<input type="checkbox"/>	<input type="checkbox"/> Bachelors Degree.....	<input type="checkbox"/>	<input type="checkbox"/> Masters Degree.....	<input type="checkbox"/>	<input type="checkbox"/> PhD.....	<input type="checkbox"/>	<input type="checkbox"/> Other.....	<input type="checkbox"/>	<input type="checkbox"/> No experience.....	<input type="checkbox"/>	<input type="checkbox"/> Less than one year (minimal).....	<input type="checkbox"/>	<input type="checkbox"/> One to three years (moderate).....	<input type="checkbox"/>	<input type="checkbox"/> Three through five years (considerable).....	<input type="checkbox"/>	<input type="checkbox"/> Six or more years (extensive).....	<input type="checkbox"/>
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<input type="checkbox"/> Three through five years (considerable).....	<input type="checkbox"/>																											
<input type="checkbox"/> Six or more years (extensive).....	<input type="checkbox"/>																											
<p>10. Licenses, Certificates and Registrations - Please indicate if there are any licenses, certificates and/or registrations required to perform your job (e.g. driver's license) (<i>Supervisor's comments regarding this information may be provided in the Supervisor's Comments section</i>)</p> <p>_____</p> <p>_____</p> <p>Are these required: <input type="checkbox"/> Upon Hire <input type="checkbox"/> Within 6 months <input type="checkbox"/> Within 1 year <input type="checkbox"/> Within 2 years <i>If requirement is specific to the license, certification or registration, please indicate timeframe by each one individually.</i></p>																												
<p>11. Special Training - Please indicate if there is any special training required to perform your job. (<i>Supervisor's comments regarding this information may be provided in the Supervisor's Comments section</i>)</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Are these required: <input type="checkbox"/> Upon Hire <input type="checkbox"/> Within 6 months <input type="checkbox"/> Within 1 year <input type="checkbox"/> Within 2 years <i>If requirement is specific to the training, please indicate timeframe by each one individually.</i></p>																												

Position Analysis Questionnaire

12.	<p>Work Level - Level of work required to complete your normal, day-to-day duties satisfactorily.</p> <p><input type="checkbox"/> Handles everyday, reoccurring basic assignments and problems (basic)</p> <p><input type="checkbox"/> Handles a variety of typical assignments and problems independently (intermediate).....</p> <p><input type="checkbox"/> Senior or supervisory level; handles all advanced assignments and problems except those requiring policy or procedural change (difficult).....</p> <p><input type="checkbox"/> Managerial in nature; directs all assignments and deals with all problems (complex).....</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
13.	<p>Work Complexity - Complexity and difficulty level associated with the tasks necessary to complete your work. Consider the level of judgment, analytical ability and creativity required and whether there are standards, policies and procedures that guide your actions.</p> <p><input type="checkbox"/> Regular and repetitive tasks, processes or operations requiring the selection and execution of actions based on defined procedures</p> <p><input type="checkbox"/> Fairly standard procedures and tasks where basic analytical ability is required, such as comparison of numbers and facts to select the correct actions. Detailed guidelines and procedures are generally used to make decisions or determine actions.</p> <p><input type="checkbox"/> Requires the application of a variety of procedures, policies and/or precedents and moderate analytic ability in adapting standard methods to fit facts and conditions.....</p> <p><input type="checkbox"/> Considerable analytical ability is needed to select, evaluate and interpret data from several sources; interpretation of guidelines, policies and procedures is required.</p> <p><input type="checkbox"/> Widely varied and involving many complex and significant variables, requiring analytical ability and inductive thinking in adapting policies, procedures and methods to fit unusual and complex situations.....</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
14.	<p>Working Conditions - Conditions you are subjected to during your day-to-day duties:</p> <p><input type="checkbox"/> Absence of disagreeable conditions (excellent).....</p> <p><input type="checkbox"/> Involves occasional exposure to some disagreeable elements (<i>dust, heat, fumes, cold, noise, vibration or wetness</i>) and accidents are improbable other than minor injuries (good).....</p> <p><input type="checkbox"/> One or more elements above; involves frequent exposure to hazards where lost-time accidents are definitely possible (somewhat disagreeable)</p> <p><input type="checkbox"/> Several elements above are occasionally present to the extent of being objectionable or regular exposure to work situations that could result in incapacitating accidents or, on occasion, loss of life (disagreeable).</p> <p><input type="checkbox"/> One or more of the above elements are regularly present and objectionable, or continuing exposure to work situations that could result in incapacitating accidents or periodic exposure to situations involving hazards that could result in total disability, critical illness or loss of life (hazardous).....</p> <p><input type="checkbox"/> Continuous exposure to work situations involving hazards that could result in total disability, critical illness or loss of life, despite the provision and/or implementation of available safety measures (very hazardous).</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
15.	<p>Mental Stress and/or Effort - Conditions you are subjected to during your day-to-day duties:</p> <p><input type="checkbox"/> Limited mental effort and/or stress.....</p> <p><input type="checkbox"/> Some mental effort and stress involved resulting in inconvenience and frustration.</p> <p><input type="checkbox"/> Considerable mental effort and stress</p> <p><input type="checkbox"/> Serious mental stress involved that could, over a period of time, result in temporary nervous disorder and severe mental anguish.</p> <p><input type="checkbox"/> Severe mental stress involved that could result in permanent nervous disorder/mental instability</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
16.	<p>Interpersonal Skills and Communication Skills - Skills required during your day-to-day duties:</p> <p><input type="checkbox"/> Little or no contact required except with immediate associates and direct supervisor (limited).....</p> <p><input type="checkbox"/> Regular contact within the department and periodic contacts with other departments, outside agencies and the general public (general).....</p> <p><input type="checkbox"/> Regular contact within the department and other departments, outside agencies and general public (supplying or seeking information) on specialized matters (reactive).....</p> <p><input type="checkbox"/> Outside and inside contacts to carry out organization programs or occasional contacts with officials at higher levels on matters requiring cooperation, explanation and persuasion, or work requiring enforcement of laws, ordinances, policies and procedures (proactive)</p> <p><input type="checkbox"/> Regular contact with persons of importance and influence involving considerable tact, discretion and persuasion (influential).</p> <p><input type="checkbox"/> Continuing contact involving difficult negotiations calling for well-developed sense of timing and strategy; representing department or organization in policy settings (managerial).....</p>	<p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>Please list people or groups with whom you must interact and/or communicate in the performance of your job. (e.g.: citizens, customers, clients, elected officials, supervisors, subordinates, consultants, engineers, etc.)</p> <p>_____</p> <p>_____</p> <p>_____</p>		

Position Analysis Questionnaire

17. **Level of Responsibility** - How much freedom or independence is required or allowed in the performance of your normal duties:
- Close supervision, or tasks are so routine and standardized that they do not require supervision (prescribed).....
 - Moderate supervision within standard operating procedures; supervisor or senior workers are generally nearby to answer questions, make "judgment calls" and/or prioritize work (standardized).....
 - Limited supervision with general autonomy in determining how objectives are achieved; supervisors generally set operating benchmarks, goals and objectives (directed).....
 - General direction, based on broad goals and policies (broad).....
 - Involves setting policies and goals for the department or organization operation (strategic).....

18. **Organizational Impact and Consequences** - How your daily duties impact the organization and the consequences of those duties:
- Supportive, informational, recording or other services to assist others in producing correct and effective results; minor consequences (incidental).....
 - Assisting and supporting others or individually providing data or facilitating services for use by others; minor to moderate consequences (advisory).....
 - Daily actions or services affect individual clients/citizens; activity has moderate impact on specific cases in service area (operational).....
 - Participating with others (within and/or outside of community/agency) in program development, service delivery and supervision of subordinate staff; moderate to serious impact (contributory).....
 - Major individual impact on and accountability for end results affecting organizational unit or total community/agency (primary).....

19. **Financial** - Please indicate the dollar amount over which you have accountability, approval and/or authority. (*Supervisor's comments regarding this information may be provided in the Supervisor's Comments section*)
- | | | |
|---|--|---|
| <input type="checkbox"/> \$0 (N/A) | <input type="checkbox"/> \$20,000 - \$49,000 | <input type="checkbox"/> \$1,000,000 - \$4,999,999 |
| <input type="checkbox"/> \$1 - \$999 | <input type="checkbox"/> \$50,000 - \$99,999 | <input type="checkbox"/> \$5,000,000 - \$19,999,999 |
| <input type="checkbox"/> \$1,000 - \$4,999 | <input type="checkbox"/> \$100,000 - \$499,999 | <input type="checkbox"/> \$20,000,000 - 49,999,999 |
| <input type="checkbox"/> \$5,000 - \$19,999 | <input type="checkbox"/> \$500,000 - \$999,999 | <input type="checkbox"/> \$50,000,000 + |

20. **Supervision and/or Oversight** - The scope and type of responsibility that you exercise as a supervisor or lead worker of other employees. (*Supervisor's comments regarding this information may be provided in the Supervisor's Comments section*)

Do you supervise or have oversight of other positions: Yes, continue in this box No, continue to next section

Please check all that apply:

N/A Work Group/Team Unit/Section Department Division Organization

List the positions by title, along with number of individuals within the position, that you have responsibility for:

For the positions listed above, do you effectively recommend or take action on the following:

Effectively Recommend	Take Action		Effectively Recommend	Take Action	
<input type="checkbox"/>	<input type="checkbox"/>	Hire	<input type="checkbox"/>	<input type="checkbox"/>	Suspend
<input type="checkbox"/>	<input type="checkbox"/>	Assign Work	<input type="checkbox"/>	<input type="checkbox"/>	Terminate
<input type="checkbox"/>	<input type="checkbox"/>	Direct Work	<input type="checkbox"/>	<input type="checkbox"/>	Discipline (Oral Reprimand)
<input type="checkbox"/>	<input type="checkbox"/>	Reward	<input type="checkbox"/>	<input type="checkbox"/>	Discipline (Written Reprimand)
<input type="checkbox"/>	<input type="checkbox"/>	Transfer	<input type="checkbox"/>	<input type="checkbox"/>	Evaluate Performance
<input type="checkbox"/>	<input type="checkbox"/>	Promote	<input type="checkbox"/>	<input type="checkbox"/>	Demote
<input type="checkbox"/>	<input type="checkbox"/>	Adjust Grievances	<input type="checkbox"/>	<input type="checkbox"/>	Coach and/or Counsel
<input type="checkbox"/>	<input type="checkbox"/>	Train	<input type="checkbox"/>	<input type="checkbox"/>	Develop Staff Schedules
<input type="checkbox"/>	<input type="checkbox"/>	Inspect Work	<input type="checkbox"/>	<input type="checkbox"/>	Other

Americans with Disabilities Act Supplemental Information Form

In order to assist in developing class descriptions which recognize and accommodate the requirements of the Act, each employee is requested to complete the attached ADA supplemental information form. Please check only those physical requirements or activities and sensory requirements that are **absolutely necessary** to perform the essential functions of your job and those environmental conditions which apply. **If options provided are not applicable, please do not check the corresponding box.**

The employee should check the appropriate box on the left side of the form. Supervisors should review information provided by the employee and verify the requirements of the position by checking the appropriate box on the right side of the form.

1. The physical requirements of this position.

Does this job require that weight be lifted or force be exerted? If so, how much and how often? Check the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Up to 10 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 25 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 50 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 100 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In excess of 100 pounds of force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What is being lifted: _____

2. The physical activity of this position.

How much on-the-job time is spent in the following physical activities? Show the amount of time by checking the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speak or hear	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use hands to finger, handle or feel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climb or balance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stoop, kneel, crouch or crawl	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reach with hands and arms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Taste or smell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push or pull	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repetitive Motions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. The sensory requirements of the position are:

Visual Acuity

- Standard vision requirements.....
- Close vision.....
- Distance vision.....
- Ability to adjust focus.....
- Depth perception.....
- Color perception.....
- Night vision.....
- Peripheral vision.....

Vocal Communication

- Expressing or exchanging ideas by means of the spoken word.....
- Detailed or loud talking to convey detailed or important spoken instructions to others accurately, loudly or quickly.....

Hearing Perception

- Ability to recognize information at normal spoken word levels.....
- Ability to receive detailed information through oral communications and/or to make fine distinctions in sound.....

Employee (check all that apply)

Supervisor (verify job requirement)

Sensory Utilization

- Preparing and analyzing written or computer data.....
- Visual inspection involving small defects and/or small parts.....
- Use of measuring devices.....
- Assembly or fabrication of parts within arms length.....
- Operating machines.....
- Operating motor vehicles or equipment.....
- Observing general surroundings and activities.....

4. The environmental conditions the worker will be subject to in this position.

How much exposure to the following environmental conditions does this job require? Show the amount of time by checking the appropriate boxes below.

	Employee Amount of Time				Supervisor's Input			
	None	up to 1/3	1/3 to 2/3	2/3 & up	None	up to 1/3	1/3 to 2/3	2/3 & up
Wet, humid conditions (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work near moving mechanical parts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work in high, precarious places	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fumes or airborne particles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic or caustic chemicals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor weather conditions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme cold (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Extreme heat (non-weather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk of electrical shock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work with explosives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vibration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Breathing apparatus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exposure to blood borne pathogens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. Typical Noise Level

Employee (check only one)

Supervisor (verify job requirement)

- Very Quiet (e.g. park trail, storage or file room).....
- Quiet (e.g. library, private offices).....
- Moderate Noise (e.g. business office with typewriters and/or computer printers, light traffic).....
- Loud Noise (e.g. heavy traffic, large earth-moving equipment).....
- Very Loud Noise (e.g. jack hammer work, garbage recycle plant).....

