

Original

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# COMPENSATION AND PAY CLASSIFICATION PLAN STUDY

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RAYTOWN C-2 SCHOOL DISTRICT'S  
BOARD OF EDUCATION



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# Letter of Transmittal

Steve Shelton, Associate Superintendent of Operations  
Raytown C-2 School District's Board of Education  
6608 Raytown Road  
Raytown, MO 64133

Re: COMPENSATION AND PAY CLASSIFICATION PLAN STUDY

To Whom It May Concern:

MGT of America Consulting, LLC (Herein referred to as "MGT"), hereby submits its response to your Request for Proposal dated April 5, 2021, and agrees to perform as proposed in their proposal, if awarded the contract. MGT shall thereupon be contractually obligated to carry out its responsibilities respecting the services proposed.

MGT's response provides the District with related firm qualifications, key experience, a detailed work plan with timeline, and associated fees to provide services that exceed expectations. We are combining our national Human Capital and PK-12 practices to ensure we have the best team to give you the best final product possible. We know compensation studies, know PK-12, are familiar with the State of Missouri, and know we would be a perfect fit for the District.

## *Why is MGT the Most Qualified to Conduct the District's Study?*

- ✓ **Experience.** MGT has the experience and certifications that HR departments need. MGT staff are certified as Senior Human Resources Management Certified Professionals (SHRM-CP), Certified Compensation Professionals (CCP), Project Management Professionals (PMP), and Change Management Professionals (Prosci). Additionally, MGT has conducted over 300 human capital studies (e.g., human resources reviews, compensation and classification studies, and organizational reviews) nationwide. Furthermore, many of our clients are repeat clients, attesting to our acumen for PK-12 human resources consulting services and our desire to work with each public sector client to create a lasting bond that ensures their success over time.
- ✓ **Best Practices Comparisons.** MGT offers the District extensive experience to identify exemplary management practices – reflective of District input and that of comparable localities. This experience gives us not only a ready reference point for reviewing the District's compensation and classification system, but also provides us with practices that have been proven successful in other similar organizations. This knowledge is of significant value when we design recommendations for improvements.
- ✓ **Sound Findings and Recommendations.** In our experience, most major improvements in PK-12 operations require bold thinking. In helping the District reconcile its pay system with its years of development and workforce changes, our team members will not hesitate to question existing organizational structures, programs, policies, rules, statutes, operations, work processes, and staffing patterns. We will make sound recommendations for

LETTER OF TRANSMITTAL

improvements that produce real—*not just on paper*—savings and ease of future pay administration for the District.

- ✓ ***Assistance in the Implementation of Recommendations.*** We will not simply leave the District with a report and a plethora of recommendations. MGT is prepared to assist the District in developing, implementing, and sustaining an equitable compensation study and classification system. We will create detailed implementation strategies and work with you to successfully achieve the implementation process. We also provide no-cost assistance for a 12-month period following study completion to ensure a smooth transition from current to desired state.
- ✓ ***Objectivity and Flexibility.*** As an independent entity, our only vested interest is that of the client. Therefore, we will apply our extensive experience to generating objective independent solutions to assist the District. In addition, we will be receptive to your insights and concerns and will accommodate any changes necessary to ensure the completion of a valid and responsive final report and, more importantly, an implementable compensation schedule relevant to the District's realities in 2020 and beyond.

Thank you for the opportunity to submit a proposal to the Raytown C-2 School District's Board of Education. We trust that as you review the qualifications presented on the following pages you will agree that MGT can meet or exceed your services requirements and offers the District the best overall value. MGT has read and agrees to the Conditions set forth in this RFP. Should you have questions on any aspect of this proposal, please contact **Mr. Brandon Ledford** at **814.312.1055** or **[BLedford@mgtconsulting.com](mailto:BLedford@mgtconsulting.com)**.

Regards,



Fred Seamon, Ph.D.

Executive Vice President

# Profile of Proposer

**MGT of America Consulting, LLC** (MGT) is pleased to present this proposal to the Raytown C-2 School District’s Board of Education for a Compensation and Pay Classification Plan Study.

MGT was established in 1974 by a group of former education sector administrators to provide management consulting services to help public sector clients operate more efficiently, effectively, and with more accountability to the communities they serve. Since then, MGT has flourished as a full-service management consulting firm, providing high quality management consulting services to public sector clients nationwide. MGT’s clients appreciate and benefit from high-quality quantitative and qualitative analysis, detailed findings, and objective recommendations that are practical and actionable.

MGT has a **46-year history** of providing innovative yet practical solutions to public sector clients. We provide objective, creative, expert services in the areas of human capital, finance, technology, programming, and planning. We draw on the expertise of our highly qualified staff, most of whom have prior careers at PK-12 and Higher Education institutions, as well as city-, county-, and state-level government offices. This insider's knowledge of local school district operations and structure give MGT a competitive advantage and an ability to hit the ground running from the very start of a project.

**MGT of America Consulting, LLC is a financially stable, national consulting firm with local offices and 100+ staff in 16 states.**

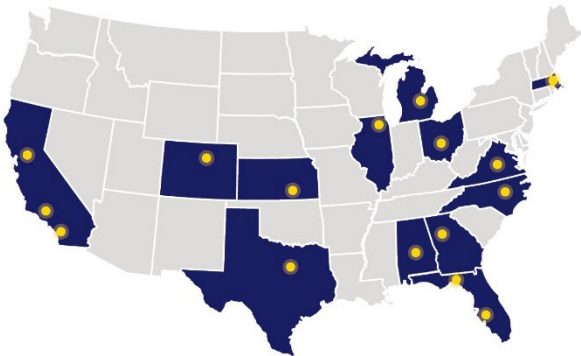
**MGT of America, Inc. restructured in 2015, becoming MGT of America Consulting, LLC.**

**MGT is a privately-held, employee-owned and quickly growing Limited Liability Company with a deep roster of experts and resources.**

Our firm includes **nearly 220 professionals and administrative staff** to support our clients’ success. MGT’s corporate office is in Tampa, Florida, with additional offices around the country as shown below.

## NATIONAL FIRM LOCAL FOCUS

- |  |                                  |                             |
|--|----------------------------------|-----------------------------|
| <b>ALABAMA</b><br>Montgomery                             | <b>KANSAS</b><br>Wichita         | <b>OHIO</b><br>Columbus     |
| <b>CALIFORNIA</b><br>Sacramento   Pasadena<br>  Carlsbad | <b>ILLINOIS</b><br>Chicago       | <b>TEXAS</b><br>Dallas      |
| <b>COLORADO</b><br>Denver                                | <b>MASSACHUSETTS</b><br>Boston   | <b>VIRGINIA</b><br>Richmond |
| <b>FLORIDA</b><br>Tallahassee   Tampa                    | <b>MICHIGAN</b><br>Bay City      |                             |
| <b>GEORGIA</b><br>Atlanta                                | <b>NORTH CAROLINA</b><br>Raleigh |                             |



The MGT Human Capital team has an impressive track record of providing customized solutions, objective research, creative recommendations, and quality products that respond to each client's unique needs and time requirements. MGT’s project team has years of experience in human capital leadership, including classification and compensation consulting and other human capital projects for a wide variety

## PROFILE OF PROPOSER

of organizations across the nation. Our proven work plan, experienced staff, and more than four decades of education and public sector consulting experience make MGT an excellent choice to provide a compensation and pay classification plan study for the District.

For **over 46 years**, our ability to excel has been driven by our expertise, quality, and our commitment to exceeding client expectations. Part of MGT's success is based upon our promise to be flexible and responsive. We are acutely aware of the political, economic, social, and technological factors that impact today's education clients. MGT is structured into several primary consulting divisions:

### MGT MAJOR CONSULTING LINES OF BUSINESS



#### Government Consulting

Everything from an organizational analysis to a jail privatization study to a strategic plan to move an organization from reactive mode to proactive mode.



#### Diversity and Inclusion

Disparity research and diversity studies to provide an organization or community with a more equitable and inclusive environment.



#### Education Solutions

From student outcomes and performance, to operational effectiveness, our solutions have impacted more than 50 million students across the globe.



#### Financial Solutions

Our nationally-recognized experts help clients weather fluctuating market conditions and rising demands on their budgets using a variety of proven solutions.



#### Human Capital

Specializing in classification and compensation studies, this practice helps public agencies retain and attract the right talent.



#### Cyber Security and Technology

We help IT and Cyber leaders navigate and manage cyber threats through a Cyber Security Office program that provides an "a la carte" menu for customization.

MGT has successfully worked with clients on **more than 12,000 projects** to help them adapt to change while maintaining the vision and direction towards their short- and long-term goals. A significant portion of MGT's engagements are repeat business, reflecting our clients' satisfaction with the quality of services delivered by MGT and our ability to exceed client expectations. MGT's commitment to quality consulting is evidenced by extensive past performance delivering an extensive range of services to a variety of educational institutions, state and local governmental agencies, and nonprofit organizations. Below is a representative sample of MGT's offerings:

BUSINESS PROCESS REENGINEERING | **CLASSIFICATION AND COMPENSATION STUDIES**  
COMMUNICATIONS AND MARKETING CONSULTING | COMMUNITY COLLABORATION | COSTING SERVICES  
DEMOGRAPHIC STUDIES | DISPARITY STUDIES | EFFICIENCY AND EFFECTIVENESS REVIEWS  
FACILITIES PLANNING AND ANALYSIS | FACILITY MASTER PLANNING | FINANCIAL ANALYSIS  
FISCAL IMPACT STUDIES AND MODELS | FUNDING STUDIES AND MODELS  
GEOGRAPHIC INFORMATION SYSTEMS | HUMAN RESOURCE CONSULTING SERVICES  
IT/CYBER SECURITY CONSULTING | MARKET AND OPINION RESEARCH | NEEDS ASSESSMENTS  
ORGANIZATIONAL/MANAGEMENT REVIEWS | PERFORMANCE AUDITS | POLICY RESEARCH  
PROGRAM EVALUATION | PROGRAM REVIEWS | STRATEGIC PLANNING

## THE MGT CONSULTING ADVANTAGE



MGT offers an **impartial perspective** of the outcomes and findings. As an independent entity, our only vested interest is that of our clients. We apply our extensive experience to generating objective, practical solutions to advance our clients' strategic priorities.



MGT understands that lasting and meaningful changes require **innovative and bold thinking**. We do not shy away from questioning everything from organizational structures and work processes to the very statutes and ordinances that create and guide the work of an agency or institution. MGT is committed to offering useful recommendations that achieve real results and is ever mindful of the practical and political realities the District may face.



**Our Human Capital project leadership operates as a core team across all projects** and our analysts are fully versed in and proficient with our methodologies. This offers clients a unique level of efficiency, as our staffing philosophy allows us to avoid the Forming – Storming – Norming – Performing team building dynamic that can often compromise efficiency and overall project quality. A significant portion of MGT's work is repeat business, reflecting a high level of customer satisfaction and our team's ability to do the job and do it right.



MGT provides solutions which are specifically tailored to meet the needs of our clients. Our Human Capital team has an impressive history of providing **customized solutions**, objective research, creative recommendations, and quality products that respond to each client's unique needs and time requirements.

## Firm Experience

We are proud to offer our incomparable consulting experience, the exceptional expertise of our team members, and our understanding and knowledge of the District's scope based on years of relevant experience. We bring the breadth and depth of knowledge and expertise vital to identifying real, practical solutions that meet our clients' needs. Part of our success is based upon our commitment to be flexible and responsive. We are acutely aware of the political, economic, social, and technological environments of today's education environment.

**MGT has conducted more than 300 compensation, classification, and human**

**resources studies for clients nationwide.** Our Human Capital practice is dedicated to helping our clients find the procedures and people they need to deliver quality service to their constituents. An equitable, competitive, and compelling compensation structure is key to reaching that goal. As the District pursues modernization of its compensation system, assuring a fair, competitive, and attractive compensation

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### **MGT: EXPERTS IN COMPENSATION**

“What I liked most about working with MGT staff is their creative approach in providing solutions to each project. The County has implemented MGT's recommendations...”

**Lisa Davidson**  
Director of Human Resources  
York County, South Carolina

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package to its employees will go far towards assuring continued quality in the provision of District services.

## MGT Human Capital Experience with PK12

A sample of projects completed by MGT most relevant to the District are provided below.

### PITTSBURGH PUBLIC SCHOOLS COMPENSATION STUDY

4/11/2019 – 10/11/2019

Shannon Plush, Coordinator, Strategic HR Projects

341 South Bellefield Avenue | Pittsburgh, Pennsylvania 15213

(412) 529-3978 | splush1@pghschools.org

MGT is currently conducting a compensation study of the District's approximately 2,716 employees in 86 job classifications. The study includes: - evaluating existing pay policies and practices, to include additional monetary incentives; -job-task analysis of all employee positions to verify and validate information from existing job descriptions; -determining whether job classifications are in compliance with federal and state laws, including the proper FLSA designation of classifications as exempt or non-exempt; -administering a comprehensive compensation survey to include employer provided benefits of those entities considered as the appropriate labor market within the District's competitive area; - recommending a revised pay plan and benefits package for Board consideration; -reviewing existing salaries to determine proper placement within proposed classifications and recommend appropriate equity adjustments; -recommending procedures, policies, and methods to maintain an on-going pay plan that is fair and competitive; -recommending policies and procedures for developing and maintaining a career track/progression/retention program; and, -providing an estimate of the fiscal impact of the recommended changes.

### BREVARD PUBLIC SCHOOLS DISTRICT-WIDE COMPENSATION STUDY

5/1/2017 – 4/1/2018

Dr. Carol Kindt, Deputy Superintendent of Human Resources

2700 Judge Fran Jamieson Way | Viera, Florida 32940

(321) 633-1000 | kindt.carol@brevardschools.org

MGT provided services to update the School Board's compensation program to best support its mission. Upon completion of the project, MGT provided recommendations that reflected the identified mission and vision of the School Board for a well-defined compensation philosophy. A final report was issued with study results, funding recommendations, and implementation options that include a multiyear phase-in.

### HARFORD COUNTY PUBLIC SCHOOLS COMPENSATION AND BENEFITS STUDY

6/30/2020 – 11/30/2020

MGT collaborated with the Human Resources staff to conduct a benchmark compensation and benefits study for all positions within HCPS, including the five bargaining units, executive compensation structure, special pay/substitute pay, and key benefits. Project deliverables for the HCPS included:

- ◆ A comprehensive evaluation of the HCPS's pay plan and compensation policies.
- ◆ Evaluation of existing pay policies and practices.
- ◆ Determination of job classification compliance with federal and state laws.



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- ◆ Comprehensive compensation survey within the HCPS’s competitive area.
- ◆ Recommendation for a revised pay plan.
- ◆ Virtual presentation to the HCPS or other leadership if needed.
- ◆ Recommendation for a revised benefit package.
- ◆ Recommendation for appropriate equity adjustments.
- ◆ Recommendations for new policies and procedures for developing and maintaining a fair and competitive pay plan and a career track/progression/retention program.
- ◆ Estimate of the fiscal impact of the recommended changes.

### DENVER PUBLIC SCHOOLS – ADAMS 14 AND OTHER DISTRICTS SCHOOL TURNAROUND

Shelagh Burke, Assistant Superintendent of Academic Affairs

5291 E 60th Ave | Commerce City, CO 80022

(303) 853.3258 | [saburke@adams14.org](mailto:saburke@adams14.org)

MGT worked to advertise and source candidates to fill high level positions within the public education sector. These included previous superintendents and high-level public school district officials in support of our turnaround program across DPS and the state.

### MGT’s Firm Experience with PK12 Over the Last Five Years

- |  |   |   |
|--|---|---|
| ◆ Adams 14 School District                 | ◆ Hillsborough County Public Schools    | ◆ Montgomery County Public Schools              |
| ◆ Atlanta PS                               | ◆ Horry County Schools                  | ◆ North Bend School District                    |
| ◆ Aurora Public Schools                    | ◆ Indiana Department of Administration  | ◆ Northern Mariana Islands Public School System |
| ◆ Aurora Public Schools-North Middle       | ◆ Indianapolis Public Schools           | ◆ OPPAGA - Alachua County Schools               |
| ◆ Beaufort County School District          | ◆ Jefferson County School District R1   | ◆ OPPAGA - Washington County Schools            |
| ◆ Beaumont Independent School District     | ◆ Jefferson County Schools              | ◆ Pasco School District                         |
| ◆ Benicia Unified School District          | ◆ Jefferson Parish Public School        | ◆ Pittsburgh Public Schools                     |
| ◆ City of Bristol                          | ◆ K12 Inc.                              | ◆ Portland Public Schools                       |
| ◆ Desoto County School District            | ◆ Laramie County School District        | ◆ Pueblo City Schools                           |
| ◆ Edina Public Schools                     | ◆ Lindbergh Schools                     | ◆ School Board of Hillsborough County           |
| ◆ Fairfax County Public Schools            | ◆ Lyon County School District           | ◆ Shelby County Board of Education              |
| ◆ Fairfield-Suisun Unified School District | ◆ Madison County School District        | ◆ Shelby County Schools                         |
| ◆ Ferguson-Florissant School District      | ◆ Manassas City Public Schools          | ◆ Spring Branch Independent School District     |
| ◆ Fresno Schools                           | ◆ McAllen Independent School District   | ◆ Springfield Public Schools                    |
| ◆ Fulton County Schools                    | ◆ Mesa Public Schools                   | ◆ Stanislaus County Office of Education         |
| ◆ Guilford County School                   | ◆ Metropolitan Nashville Public Schools | ◆ STEM Revolution                               |
| ◆ Gwinnett County Public Schools           | ◆ Midland Independent School District   | ◆ Sylvan Unified School District                |
| ◆ Hamilton County Department of Education  | ◆ Millington Municipal School District  | ◆ Wake County Public School System              |
| ◆ Hamilton County School District          | ◆ Milwaukee Public School               | ◆ Wentzville School District                    |
| ◆ Henry County Schools                     | ◆ Monrovia High School                  |   |
| ◆ Hickman Mills C-1 Schools                |   |   |

## Proposed Work Plan

The tasks below represent MGT’s proven work plan for Compensation and Classification studies.

WORK PLAN TASKS	
TASK 1.0:	Conduct Initial Meeting and Finalize Project Work Plan
TASK 2.0:	Develop and Implement a Communications Strategy; Hold Orientation Sessions
TASK 3.0:	Review Existing Classification and Compensation System
TASK 4.0:	Gather and Evaluate Current Organizational and Employee Job Data
TASK 5.0:	Identify Relevant Recruitment Market(s)
TASK 6.0:	Conduct Market Survey(s) & Benchmark All Positions
TASK 7.0:	Revise and Prepare Job Descriptions as Needed
TASK 8.0:	Develop Compensation and Classification System; Present Report
TASK 9.0:	Develop Implementation Strategies
TASK 10.0:	Provide Ongoing Assistance

The work plan outlined below consists of ten tasks, with the final task being our commitment to work with our client partners for 12 months post-study completion to address study-related questions that may arise. The nature of these tasks requires that some be done sequentially, while others may occur simultaneously.

### Task 1.0: CONDUCT INITIAL MEETING AND FINALIZE PROJECT WORK PLAN

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To meet with the designated District Project Officer (Project Officer), and other key staff as determined by the Project Officer, to gain a comprehensive and mutual understanding of the project’s background, goals, and scope.</li> <li>▪ To identify, in more detail, the District’s specific objectives and expectations for the study, other specific needs and concerns, the level of staff involvement required, and the strategies to be employed during the study.</li> <li>▪ To ensure MGT’s team has a solid understanding of the District’s present compensation system and the system’s strengths and weaknesses.</li> <li>▪ To make any needed modifications to the work plan, expected outcomes, or timeline to ensure all parties agree regarding the scope and project goals.</li> <li>▪ To agree upon a work plan, timeline, deliverables, and monitoring procedures that will lead to the successful accomplishment of all project objectives.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Revised work plan and timeline.</li> </ul>

**WORK ACTIVITIES**

- 1.1 Meet with the designated Project Officer and key client staff members (as appropriate) to accomplish the following:
  - Review the technical approach and work plan to make any necessary modifications.
  - Finalize the project schedule and assign initial responsibilities.
  - Determine how and when to best communicate project activities with the Project Officer, District staff, and administration, as appropriate.
- 1.2 Obtain relevant reports and current data, including but not limited to:
  - Existing job descriptions with detailed accounts of major duties, responsibilities, and requirements.
  - Organizational charts detailing supervisory roles for reviewing / approving job descriptions.
  - Current compensation plan(s) and personnel policies that relate to classifications, job descriptions, and pay plan issues as well as benefits administration.
  - Current guidelines used to place new or reclassified positions within the current structure(s).
  - Any previous studies, evaluations, or other reports as applicable to this project.
  - Benefits package details.
- 1.3 Review data requirements for preparing and administering MGT’s JCQ to address any potential data collection issues. The JCQ is used to capture specific job data on factors such as education requirements, experience requirements, financial authority, job complexity, authority, essential job duties, physical demands, and work environment (i.e., FLSA and ADA requirements).
- 1.4 Revise the work plan and finalize the timeline in the form of an Action Plan for each project task with the designated Project Officer, and update the following, as needed:
  - Data collection approach, in terms of questionnaires and related documentation.
  - Specifications of deliverables.
  - Revised schedule of deliverables.
  - Monitoring and / or reporting procedures.

**Task 2.0: DEVELOP AND IMPLEMENT A COMMUNICATIONS STRATEGY; HOLD ORIENTATION SESSIONS**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To provide key District stakeholders with input into study goals and objectives at the beginning of the process.</li> <li>▪ To create a clear and simple strategy to communicate the compensation and classification study process to District stakeholder groups.</li> <li>▪ To obtain input from employees on the study goals and objectives.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Remote orientation session(s) if desired.</li> <li>▪ Solicitation and discussion of key stakeholder feedback.</li> <li>▪ Communications plan set for status updates.</li> </ul>

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<ul style="list-style-type: none"> <li>▪ To maximize opportunities for participation and review by key District stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Customized Frequently Asked Questions (FAQ) document for employees.</li> <li>▪ Action Plan</li> </ul>
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**WORK ACTIVITIES**

- 2.1 Work with the Project Officer to schedule orientation presentation(s), if desired, with District staff and administration to provide an outline of the project, tasks, and timelines, and to explain how employees will be involved in project activities.

This activity will include a review of the JCQ and the Management Issues Paper® (MIP) (found in **Appendix B**) data collection processes to promote a smooth and quality data collection process. The MIP survey serves two major purposes: 1) to offer supervisory employees the opportunity to briefly express their concerns regarding the current compensation and classification system, as well as organizational structure, to the project team; and 2) to identify key areas of focus to set the analysis and review process in the proper direction.

- 2.2 Identify any critical issues raised during the orientation session(s), or through interviews/focus groups with key department staff and share with the Project Officer.
- 2.3 Resolve and / or prepare a strategy for addressing critical issues.
- 2.4 Agree upon, and document, future communications including periodic update meetings and additional meetings to present the final report to designated District administrators.
- 2.5 Agree upon, and document, future communications with key stakeholders and the Project Officer for providing status updates on the progress of work plan tasks.

**Task 3.0: REVIEW EXISTING CLASSIFICATION AND COMPENSATION SYSTEM**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To perform a comprehensive review of the District’s current compensation system.</li> <li>▪ To assess the District’s current compensation policies in terms of assigned target market value to determine competitiveness.</li> <li>▪ To review the District’s current job descriptions for employees.</li> <li>▪ To review related compensation administration policies and the factors currently used by the District in determining pay grade or salary level.</li> <li>▪ To identify opportunities to consolidate job classes and overall compensation program to ease future maintenance of such frameworks</li> </ul>	<ul style="list-style-type: none"> <li>▪ Assessment of current compensation system.</li> </ul>

**WORK ACTIVITIES**

- 3.1 Review existing pay structures and compensation philosophy documentation. Request and verify data for each employee, including but not limited to, name, current salary, years of service, rank in the organization, organizational structure, recruitment market classification, and assigned department.

- 3.2 Analyze job placement in the current system using current job descriptions, duties, and responsibilities gathered from the JCQ data collection, employees’ educational credentials, employee longevity within the District, current position, and other relevant work experience.
- 3.3 Identify classifications and incumbents that fall outside of the predicted placement in the compensation plan.
- 3.4 Review the existing pay structure and note potential issues to be resolved.

**Task 4.0: GATHER AND EVALUATE CURRENT ORGANIZATIONAL AND EMPLOYEE JOB DATA**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To review existing position compensation and classification plan documents, current organizational charts, prior studies, and databases.</li> <li>▪ To administer MGT’s JCQ, as modified to meet District needs, to employees to collect relevant job data for analysis.</li> <li>▪ To administer MGT’s MIP survey to offer supervisory employees the opportunity to identify compensation, classification, and organizational problems relating to their own areas of responsibility.</li> <li>▪ To review JCQ and MIP data and related information.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Administration of MGT’s JCQ (or current District instrument, if desired) and MIP surveys.</li> <li>▪ Analysis of JCQ and MIP data.</li> </ul>

**WORK ACTIVITIES**

- 4.1 Work with the Project Officer to administer the JCQ, or current instrument utilized by the District – if preferred – to employees included in this engagement.
- 4.2 Work with the Project Officer to modify and administer the MIP survey to supervisory employees included in this engagement.
- 4.3 Review the MIP surveys completed by administrators, managers, and supervisors to identify concerns regarding position levels and descriptions, organizational structure, and other issues as needed.
- 4.4 Review and analyze the results from the JCQ data collection to assist in the determination of the following:
  - Education and experience requirements.
  - Certification / license requirements.
  - Levels of responsibility and authority.
  - FLSA / ADA compliance.
  - Internal and external relationships.
  - Updated job duties and responsibilities, including physical requirements.

**Task 5.0: IDENTIFY RELEVANT RECRUITMENT MARKET(S)**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To identify the appropriate recruitment market(s) for positions included in the study and for use in the selection of relevant market data sources.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Recruitment market(s) identified.</li> <li>▪ Data sources identified for benchmarking.</li> </ul>

**WORK ACTIVITIES**

- 5.1 Work with the Project Officer to identify the appropriate public / private recruitment market(s) for included positions. Market levels may include District-recommended local jurisdictions at the state, county, town, or other locality level. Additional regional and national benchmarks may be included for more uniquely competitive positions, such as senior leadership/executive.
- 5.2 Identify appropriate data sources for benchmarking positions. Data sources may include:
  - Salary.com CompAnalyst data available and designed to support unique situations, such as hybrid positions.
  - Data gathered through market peer salary surveys from identified comparable organizations (see Task 6.0 below).

**Task 6.0: CONDUCT MARKET SURVEY(S) & BENCHMARK ALL POSITIONS**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To determine appropriate public and private organizations, in collaboration with the District, that offer comparable employment opportunities to use for benchmark comparisons. Consideration will be given to the following criteria:                             <ul style="list-style-type: none"> <li>– <b>Geographic Area (Location).</b> The geographical scope of the labor market survey (i.e., local, statewide, regional, or national recruitment areas).</li> <li>– <b>Service Structure.</b> Organizations with comparable jobs and similar organizational structure and economic characteristics.</li> <li>– <b>Size.</b> Comparability of organizational size (measured through number of management and non-management positions, budget, population served, etc.).</li> </ul> </li> <li>▪ To select benchmark positions that meet the approval of the Project Officer and are appropriate to use in conducting a market salary survey. Benchmarks selected for the market salary survey should be based on the following criteria:                             <ul style="list-style-type: none"> <li>– Benchmarks should be reasonably well-known and concisely described.</li> <li>– Benchmarks should have a clear and identifiable relationship to other classes in their occupational group (i.e., job family) to ensure they will serve as a good reference point in relating and establishing salaries for other classes within their job category.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Creation and distribution of market survey(s).</li> <li>▪ Analysis of market survey results.</li> </ul>

<ul style="list-style-type: none"> <li>– Benchmarks should be representative of the various functional areas, job categories, and pay levels within the District.</li> </ul>	
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**WORK ACTIVITIES**

- 6.1 Establish a set of benchmark classifications consisting of selected positions that are utilized by the District and comparable organizations.
- 6.2 In close collaboration with the District, identify comparable organizations to survey and use for benchmark comparisons.
- 6.3 Conduct salary surveys.
- 6.4 Analyze data.
- 6.5 Prepare report of survey results.

**Task 7.0: REVISE AND PREPARE JOB DESCRIPTIONS AS NEEDED**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To revise staff job descriptions, as needed, in a format agreed to by the District.</li> </ul>	<ul style="list-style-type: none"> <li>▪ A set of updated job descriptions.</li> <li>▪ Documented process for evaluating new / revising current jobs.</li> </ul>

**WORK ACTIVITIES**

- 7.1 Review and examine JCQ data, MIP data, and additional comments from key stakeholders and managers concerning each position, personnel organizational charts, and similar documents.
- 7.2 Develop a draft job description format, if desired. All job descriptions (i.e., ~260 based on the number of job classifications in the RFP) will be updated in Microsoft Word format and will include factors such as but not limited to:
  - Essential job functions.
  - Knowledge, skills, and abilities.
  - Minimum qualifications.
  - Materials and equipment used.
  - Special certifications or requirements.
  - ADA characteristics of the position (i.e., physical, environmental, and sensory).
- 7.3 Make appropriate revisions to job descriptions.
- 7.4 Document process used to evaluate new/revise current jobs and provide as an operating guide.

**Task 8.0: DEVELOP COMPENSATION AND CLASSIFICATION SYSTEM; PRESENT REPORT**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To provide an updated / new compensation system that:                             <ul style="list-style-type: none"> <li>– Reflects the relevant recruitment markets in which the District competes.</li> <li>– Is flexible to manage and update for ongoing maintenance and administration.</li> <li>– Contributes to the overall efficiency and effectiveness of the District operations.</li> <li>– Reflects the mission, goals, and strategic plan of the District.</li> <li>– Reflects the new organizational structure and includes updated organizational charts, if necessary.</li> <li>– Provides implementation strategies for moving employees into the new structure(s).</li> <li>– Provides flexibility and guidelines for maintenance of the new structure(s).</li> </ul> </li> <li>▪ To develop and present a final report containing detailed narrative about the study’s methodology, results, implementation strategies, guidelines for maintenance, and implementation costs. The final report will include a detailed description of the development and characteristics of the proposed pay structure(s), including grade and range spreads. Includes onsite presentation on the study results if desired.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Draft report.</li> <li>▪ Final report.</li> </ul>

**WORK ACTIVITIES**

- 8.1 Confirm with the Project Officer and other appropriate officials the desired characteristics of the updated District compensation and classification system.
- 8.2 Integrate employee and classification data into compensation and implementation reports.
- 8.3 Develop draft models for the District’s consideration. The drafts will provide steps for transitioning employees from their current classifications and / or salary structures to the proposed system.
- 8.4 Develop communication materials and process for any employee appeals.
- 8.5 Identify the financial impact of the revised compensation system.
- 8.6 Review the draft compensation system, including financial impact, with the Project Officer and other appropriate staff.
- 8.7 Complete revisions, if any and as appropriate, and prepare and provide the final report, which includes onsite presentation on the study results. The final report will detail the recommended compensation system and results of the market comparisons, including an overview of the key issues, methodology, and recommendations of the study. Specifically, the final report will include the following:
  - Identification of organizations surveyed and the selected benchmarks.



PROFILE OF PROPOSER

- Identification of how District positions relate and compare to the market.
- Identification of the new organizational structure and includes updated organizational charts, if necessary.
- Survey data information.
- Inclusion of those classes where no market data were identified, if any, and discussion of how those positions are classified to ensure internal equity.
- Detailed narrative of the study’s methodology, processes, and data selection.
- Detailed description of the creation and characteristics of the proposed system.
- Tables reflecting proposed salary structures and the recommended salary grade ranges for each classification.
- Costs to implement study recommendations with the presentation of phase-in options.
- Identification of outliers (i.e., employees falling above or below current proposed minimum and maximum salaries).
- Guidelines for ongoing system maintenance and administration. Includes best practices on promotions, transfers, succession planning, and other compensation policies.

**Task 9.0: DEVELOP IMPLEMENTATION STRATEGIES**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To provide phase-in options and cost projections for proposed changes.</li> <li>▪ To provide policies and procedures for long-term system maintenance and administration.</li> <li>▪ To assist in communicating the results of the classification and compensation study to key stakeholders.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Phase-in options and cost projections.</li> <li>▪ Policies and procedures for system maintenance and administration.</li> <li>▪ Communication of study results.</li> </ul>

**WORK ACTIVITIES**

- 9.1 Review study results with the Project Officer and other key staff, as directed, to identify and determine options for migrating the District from its current system to the recommended system.
- 9.2 Communicate study results to designated District leadership, including Board of Education, Rayteam - Meet and Confer Committee, and Superintendent’s Leadership Team, as desired.

**Task 10.0: PROVIDE ONGOING ASSISTANCE**

OBJECTIVE(S)	PROJECT DELIVERABLE(S)
<ul style="list-style-type: none"> <li>▪ To provide staff consultation for a period of 12 months.</li> </ul>	<ul style="list-style-type: none"> <li>▪ On-call consultation for 12 months. (MGT maintains ongoing relationships with all clients.)</li> </ul>

## WORK ACTIVITIES

- 10.1 Prepare compensation system materials and training for administering and maintaining the system and share with the Project Officer and key stakeholders. Revise, as necessary, and provide final copies. All materials are provided in Microsoft Word or Excel format, and there is no additional software necessary for purchase in implementation and maintaining the new system.
- 10.2 Provide consultation to HR on the maintenance and administration of the system.
- 10.3 Follow-up with key District staff to address any issues related to system implementation.

## Work Plan Assumptions

Providing assumptions helps the entire team (client and consultant) fully understand each other's expectations for the project. The following outlines our work plan assumptions:

- 1) MGT will work with the District to find the appropriate balance between onsite and virtual work due to the COVID-19 pandemic. MGT can and has successfully performed all tasks virtually.
- 2) The District will designate a Project Officer in concert with (or prior to) project kick-off.
- 3) All phases of the project will involve significant input from key identified District stakeholders, including the Project Officer.
- 4) MGT will request employee / position data in a standard database format (Excel). The District will need to provide a usable database within a reasonable amount of time (e.g., two weeks) to meet the agreed upon study schedule. The initial work conducted by MGT's team will be dependent on receiving the requested information in this database request. MGT will provide immediate notification if the database does not meet specifications. If data (e.g., employee names, salaries, etc.) cannot be provided, any additional programming or data mining work performed by MGT to establish a usable database or to clean a database provided by the District will be approved prior to initiation.
- 5) If the District prefers that MGT utilize additional sources of salary data (e.g., a subscriber service, or regional salary survey), the District will facilitate MGT's access and bear any associated costs.
- 6) Data collection and analyses will primarily be conducted online, with interviews and focus groups utilized as necessary to ensure successful project outcomes.
- 7) The implementation of the new system will be dependent upon the District's fiscal considerations and other factors to be identified by the District during the work effort.
- 8) The study is divided into tasks, although some will occur simultaneously to best meet the District's desired schedule. In order to meet the quick turnaround schedule proposed, and additional reviews of materials by the District will need to occur within two weeks of submission.
- 9) A clear and concise implementation plan and strategy will be provided to the District to enable an appropriate phase-in of study results.

- 10) MGT will be available to the District for a period of 12 months following the completion of the project, as needed, for implementation follow-up.
- 11) Final reports are assumed final, if we do not hear from the District within two weeks of report delivery (email or hard copy).

The entire classification and compensation study process is transparent, and all data collection instruments, methodology, and final outcomes will be documented in great detail. All files are provided in Excel or Word formats for maximum implementation efficiency and periodic updating.

## Contact Information

<b>MGT HEADQUARTERS</b>	<b>MGT of America Consulting, LLC</b> 4320 West Kennedy Boulevard   Tampa, Florida 33609 P: 813.327.4717   Fax: 850.385.4501   www.mgtconsulting.com
<b>PRIMARY PROJECT CONTACT</b>	<b>Brandon Ledford, Senior Vice President, Human Capital</b> 4320 West Kennedy Boulevard   Tampa, Florida 33609 P: 814.312.1055   bledford@mgtconsulting.com

## Sample Reports

A sample report can be found in **Appendix D. Sample Report.**

# Summary of Proposer's Qualifications

## Qualifications of Key Personnel

The success of a consulting engagement depends on the qualifications of the project team and the way in which the review is structured and managed. Accordingly, our proposed organizational structure includes:

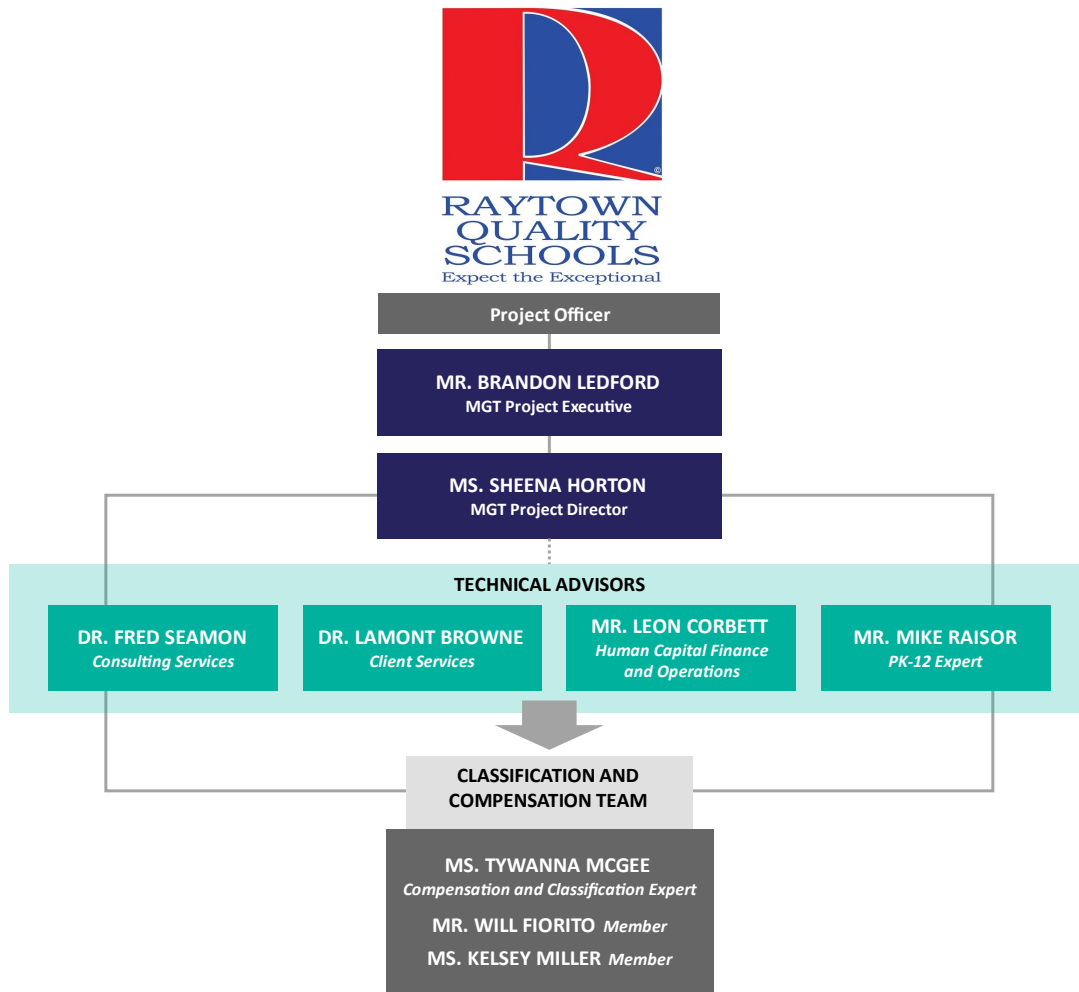
- ◆ Strict adherence to a detailed work plan and schedule specifically designed for conducting a quality compensation and classification study that clearly assigns responsibilities and reporting dates for each major activity.
- ◆ An organizational structure consisting of clearly assigned work tasks, reporting deadlines, and experienced staff members who are organized and ready to begin work immediately upon execution of a contract.
- ◆ The use of staff members who are thoroughly familiar with human resources practices and have a detailed understanding of and expertise in conducting compensation and classification studies.
- ◆ A close and structured working relationship between MGT's Project Director and the District's designated Project Officer. This will entail meetings, progress reports, and information exchanges to ensure all priorities, changes, and challenges are communicated immediately to prevent waste of time and resources.

All of our work with clients is characterized by the belief that we can only be successful if our clients develop the knowledge, capacity, and mechanisms to help themselves. To that end, all of our services:

- ◆ Build on our clients' existing strengths and resources while pressing them to address areas of weakness.
- ◆ Assist our clients learn about widely recognized best practices and emerging research.
- ◆ Encourage our clients to develop the habit of selecting and collecting essential data and acting on it.
- ◆ Help our clients maximize the efficiency and effectiveness of their human and fiscal resources.
- ◆ Provide pragmatic and affordable solutions that will be deliverable and sustainable long term.

Illustrated in **Exhibit 1** is the proposed management structure for this project, which has been designed to define the roles and responsibilities of each team member assigned to this project and to facilitate project management. The strength and experience of our team will allow for efficient and effective project management and results. Each team member has a wide range of project experience working with clients similar to the District's. The team we have designated is highly experienced with this type of engagement, and therefore requires little orientation time.

Exhibit 1. Project Organizational Structure



## Project Staff Roles and Responsibilities

### **District Project Officer ▶ To be Determined**

MGT suggests the District appoint a single point of contact to serve as the Project Officer. The Project Officer will have primary responsibility and final authority over all activities, and he/she will provide project guidance and direction to the MGT team. The Project Officer will approve the contract, work plan, and final report. All project correspondence, progress reports, and final reports will be delivered to the Project Officer.

### **MGT Project Executive ▶ Brandon Ledford, Senior Vice President, Human Capital**

The Project Executive will be the primary person responsible for ensuring the resources to conduct the study are available from start to finish and that the team fulfills all contractual requirements, produces a quality report, and meets all project deadlines. The Project Executive, also as Practice Lead, is responsible for ensuring client success.

**MGT Project Director ▶ Sheena Horton**

The MGT Project Director is the main point of quality control, has final authority for the project and deliverables, and helps resolve conflicts over any project issues. She will address any questions or concerns throughout the project and will be available to attend necessary meetings and present the final report findings to District staff. In addition, the Project Director will be responsible for the day-to-day management of all project activities, which includes refining procedures, assigning and monitoring all activities, and maintaining frequent contact with the District Project Officer throughout the lifecycle of the project. She will participate on-site and/or virtually for key meetings and presentations.

**Technical Advisors ▶ Fred Seamon | Lamont Browne | Leon Corbett | Mike Raisor**

Dr. Seamon is the Senior Technical Advisor of all MGT government consulting projects. He will oversee the project and consult with the MGT Project Executive.

Dr. Lamont Browne is a strong educational, business, diversity, and talent leader, and is a change agent focusing on quality, equity, and inclusivity. He excels in developing high functioning teams who work collaboratively to design and implement strategic systems that enhance organizational performance. He will oversee client satisfaction.

As the Finance and Operations Technical Advisor, Mr. Corbett will provide expertise regarding all aspects of Human Capital finance.

Mr. Raisor will provide insight and guidance on PK-12 operations.

**MGT Consultant Team ▶ Tywana McGee | Will Fiorito | Kelsey Miller**

Ms. Tywana McGee, CCP, SHRM-CP, is a Compensation Consultant and strategic business partner with experience in compensation design and administration, leadership, project management, policy development and interpretation, and negotiation.

These individuals will work in close contact with MGT's Project Director, technical advisors, DSBI team, and key District officials, as appropriate, to customize and execute each work task and fulfill the District's stated expectations. Under the supervision of the Project Director, they will review, document, evaluate, and generate recommendations in accordance with each component of the work plan.

***All proposed personnel for this engagement are experienced, responsible, and capable in the performance of compensation / classification data reviews and will perform all work under this contract in a manner consistent with the highest industry standards, all within the deadlines determined by the District.***

## Resumes

Resumes of each team member are provided in **Appendix C. Resumes**. The personnel described in our proposal are the professionals who will provide the services for this project.

# Summary of the Proposer's Fee Statement

MGT proposes to complete the District's project for a total cost of **\$120,674**. **Exhibit 2** details the cost by each work task in our work plan. This includes professional fees and other costs (travel, surveys, postage, etc., as applicable).

*Exhibit 2. Proposed Cost by Task*  
**Raystown C-2 School District**  
**Classification and Compensation Study**  
**PROPOSED PROJECT BUDGET**

Milestones and Tasks		Professional Hours	MGT Fees	Total Direct Expenses	GRAND TOTAL
1	Conduct Initial Meeting and Finalize Project Work Plan	8	\$1,920	\$67	\$1,987
2	Develop and Implement a Communications Strategy; Hold Orientation Sessions	23	\$4,600	\$161	\$4,761
3	Review Existing Classification and Compensation System	45	\$6,470	\$226	\$6,696
4	Gather and Evaluate Current Organizational and Employee Job Data	84	\$10,970	\$3,477	\$14,447
5	Identify Relevant Recruitment Market(s)	3	\$430	\$15	\$445
6	Conduct Market Survey(s) & Benchmark Positions	398	\$43,555	\$2,042	\$45,597
7	Revise and Prepare Job Descriptions as Needed	274	\$29,960	\$1,049	\$31,009
8	Develop Compensation and Classification System; Present Report	61	\$9,440	\$330	\$9,770
9	Develop Implementation Strategies	35	\$5,760	\$202	\$5,962
10	Provide Ongoing Assistance	0	-	-	-
<b>GRAND TOTAL, Hours and Fees</b>		<b>931</b>	<b>\$113,105</b>	<b>\$7,569</b>	<b>\$120,674</b>

# Project Time Schedule

Based on MGT’s experience conducting similar studies and the RFP requirements, we anticipate the project can be completed within nine months of project initiation as illustrated in **Exhibit 3**.

*Exhibit 3. Proposed Schedule*

WORK TASKS	MONTH 1				MONTH 2				MONTH 3				MONTH 4				MONTH 5				MONTH 6				MONTH 7				MONTH 8				MONTH 9			
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4
1 Conduct Initial Meeting and Finalize Project Work Plan	█	█	█																																	
2 Develop Communications Strategy; Orientation Sessions*			█	█	█	█	█	█																												
3 Review Existing Classification and Compensation System			█	█	█	█	█	█	█	█	█	█																								
4 Gather and Evaluate Current Organizational and Job Data							█	█	█	█	█	█	█	█	█	█	█	█	█	█																
5 Identify Relevant Recruitment Markets					█	█	█	█																												
6 Conduct Market Survey(s) & Benchmark All Positions													█	█	█	█	█	█	█	█	█	█	█	█												
7 Revise and Prepare Job Descriptions as Needed																					█	█	█	█	█	█	█	█								
8 Develop Class. & Comp. System; Present Report*																									█	█	█	█	█	█	█	█				
9 Develop Implementation Strategies																													█	█	█	█				
10 Provide Ongoing Assistance																																				→

## Customer Support

**We will not simply leave the District with a report and a plethora of recommendations.** MGT is prepared to assist the District in developing, implementing, and sustaining an equitable compensation study and classification system. We will create detailed implementation strategies and work with you to successfully achieve the implementation process. We provide no-cost assistance for a 12-month period following study completion to ensure a smooth transition from current to desired state.



# APPENDIX A. SAMPLE JCQ

## JOB CONTENT QUESTIONNAIRE®

Prepared for:

INSERT CLIENT NAME

### INTRODUCTION

The following survey is designed to collect information about your role in the organization and the job that you perform.

Survey results may be used to:


- Make pay adjustments to align individuals performing similar jobs within the organization or in similar organizations.
- Determine how your position compares to the market for pay.
- Determine if positions are accurately classified and if job titles accurately reflect position and duties.
- Ensure accurate and up-to-date job descriptions.
- Assist with staffing plan and salary schedule analyses.
- Identify positions requiring additional job analysis.

This survey will NOT:

- Determine how well you perform your job. This is not a performance evaluation.
- Decide whether there are individuals who should be released or demoted.
- Reduce individual salaries or guarantee increases.

This survey includes four main sections:

- I. Basic Job-Related Information
  - Section 1.0 – Employment Status
- II. Job Description, Duties, Responsibilities, and Requirements
  - Section 2.0 – Job Description
  - Section 3.0 – Job Duties
  - Section 4.0 – Knowledge, Skills, and Abilities
  - Section 5.0 – Function within the Organization
  - Section 6.0 – Educational Preparation
  - Section 7.0 – Experience Required
- III. Work Performed, Responsibility and Leadership, Communication, and Decision-Making
  - Section 8.0 – Work Performed
  - Section 9.0 – Responsibility and Leadership
  - Section 10.0 – Communication
  - Section 11.0 – Decision-Making
- IV. Financial Authority, Tools and Equipment, and Physical Job Factors
  - Section 12.0 – Financial Authority
  - Section 13.0 – Tools and Equipment Usage
  - Section 14.0 – Working Conditions and Physical Requirements



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**I. BASIC JOB-RELATED INFORMATION**

Name \_\_\_\_\_ Phone \_\_\_\_\_  
 E-mail \_\_\_\_\_  
 Supervisor's Name \_\_\_\_\_  
 Supervisor's E-mail \_\_\_\_\_

**SECTION 1.0: EMPLOYMENT STATUS**

Official Job Title \_\_\_\_\_  
 Working Title\* \_\_\_\_\_  
 Status (choose one)  Full-time  Part-time  
\* Unofficial title if different from official title.

**II. JOB DESCRIPTION, DUTIES, RESPONSIBILITIES, AND REQUIREMENTS**

**SECTION 2.0: JOB DESCRIPTION**

1. Please provide a brief general description of the purpose and responsibilities of your position (3-4 sentences). Please do not list specific duties here. You will list your specific duties in Section 3.0.

2. Indicate the number of Full-time and Part-time individuals you supervise: (Supervision is the management or supervision of employees who report directly to you.)  
 Full-time \_\_\_\_\_ Part-time \_\_\_\_\_

**SECTION 3.0: JOB DUTIES**

1. Please list the major job duties of your position, and indicate the percentage of time that you spend annually on each major job duty.  
 (The % of Time column should total 100 percent.)

ESSENTIAL DUTIES	% OF TIME
Example 1 - Prepares briefing documents on cash availability.	20
Example 2 - Addresses citizen concerns on permit applications.	55
Example 3 - Develops complex software solutions for internal users.	25

**SECTION 4.0: KNOWLEDGE, SKILLS, AND ABILITIES**

1. Please describe the Knowledge, Skills, and Abilities necessary to perform the functions of your job. Knowledge, Skills, and Abilities are additional qualifications and attributes that are necessary to successfully perform the functions of a specific job. Examples of such statements include:

- Knowledge of maintenance equipment and procedures
- Knowledge of operations, services, and policies.
- Knowledge of general office procedures and protocols.

2. Please describe any additional related job duties:

PERCENT OF TIME SHOULD TOTAL 100%

ESSENTIAL TASKS	% OF TIME

- Knowledge of financial rules, regulations, laws, and procedures.
- Skill in cutting a board to a required measurement.
- Skill in typing 40 words-per-minute.
- Ability to communicate effectively orally and in writing.

**SECTION 5.0: FUNCTIONS WITHIN THE ORGANIZATION**

1. Please indicate the following organizational level that most closely matches your position within the organization and skip to the section indicated in parentheses at the bottom of this page. Once you have completed the section indicated in the parentheses, skip to Section 6.0 Educational Preparation.

- Clerical/Manual (skip to SECTION 5.1) - Work involves clerical tasks; following standardized procedures, techniques, or procedures; and carrying out practices according to standards set by a supervisor or employers.
- Technical/Paraprofessional (skip to SECTION 5.1) - Work involves inspecting, measuring, or comparing to a standard; utilizing special training to perform a defined function; following standardized procedures, techniques, or procedures.
- Computer Professional (skip to SECTION 5.2) - Work involves maintaining/supporting computer software, hardware, or operating systems through activities like programming, designing, developing, documenting, and analyzing computer systems or software.
- Administrator (skip to SECTION 5.3) - Work is directly related to assisting with running or servicing of the business or department.
- Professional (skip to SECTION 5.3) - Work requires advanced learning acquired by a prolonged course of specialized intellectual instruction; or work involves advising clients or assisting customers or clients with running their business.
- Executive/Managerial (skip to SECTION 5.4) - Work involves managing employees; planning, designing, or overseeing the implementation of organization projects or policies.

If you chose Clerical/Manual or Technical/Paraprofessional, skip to SECTION 5.1.  
 If you chose Computer Professional, skip to SECTION 5.2.  
 If you chose Administrator or Professional, skip to SECTION 5.3.  
 If you chose Executive/Managerial, skip to SECTION 5.4.

**SECTION 5.1: ADMINISTRATIVE DUTIES**

Only complete this section if you selected Clerical/Manual or Technical/Paraprofessional in Section 5.0, Function within the Organization. Next, skip to Section 6.0. Educational Preparation.

1. Do your primary duties involve performing office or non-manual work directly related to management or general business operations of your employer or its clients?  
 Yes  No

2. Do your primary duties include the exercise of discretion and independent judgment in matters of significance? Discretion and independent judgment imply the authority to make an independent choice, free from immediate direction or supervision. NOTE: You can exercise discretion and independent judgment even if your decisions or recommendations are reviewed at a higher level.  
 Consider the following factors and check the applicable factors to guide you in determining whether to answer yes or no.

- Have authority to formulate, affect, interpret, or implement management policies or operating practices

\* Carry out major assignments in conducting the operations of the organization  
 \* Perform work that affects operations to a substantial degree  
 \* Have authority to commit the employer in matters that have significant financial impact  
 \* Have authority to waive or deviate from established policies and procedures, without prior approval  
 \* Have authority to negotiate and bind the organization on significant matters  
 \* Provide consultation or expert advice to management; involved in planning long- or short-term objectives  
 \* Investigate and resolves matters of significance on behalf of management  
 \* Represent the organization in handling complaints, arbitrating disputes or resolving grievances  
 \* Make recommendations about significant matters to supervisors for action after comparing and evaluating possible courses of action  
 Yes  No

**SECTION 5.2: COMPUTER DUTIES**

*Only complete this section if you selected **Computer Professional** in Section 5.0. Function within the Organization. Next, skip to Section 6.0. Educational Preparation.*

1. Select "Yes" if your primary duties consist of the following:

- \* The application of systems analysis techniques and procedures, including consulting with users, to determine hardware, software or system functional specifications
- \* The design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications
- \* The design, documentation, testing, creation or modification of computer programs related to machine operating systems
- \* A combination of the aforementioned duties, the performance of which requires the same level of skills

 Yes  No

- \* Have authority to waive or deviate from established policies and procedures, without prior approval
- \* Have authority to negotiate and bind the organization on significant matters
- \* Provide consultation or expert advice to management; involved in planning long- or short-term objectives
- \* Investigate and resolves matters of significance on behalf of management
- \* Represent the organization in handling complaints, arbitrating disputes, or resolving grievances
- \* Make recommendations about significant matters to supervisors for action after comparing and evaluating possible courses of action  
 Yes  No

3. Does your primary duty consist of work requiring advanced knowledge in a field of science or learning acquired by a prolonged course of specialized intellectual instruction as distinguished from a general academic education? Consider the following factors and definitions before answering yes or no.

- \* "Advanced knowledge" means work that is predominately intellectual in character, and which includes work requiring the consistent exercise of discretion and judgment
- \* Advanced knowledge is generally used to analyze, interpret, or make deductions from varying facts or circumstances
- \* Advanced knowledge cannot be attained at the high school level
- \* "Prolonged course of specialized intellectual instruction" means that the learned professional exemption is limited to professions where specialized, academic training is a standard prerequisite for entering the profession

 Yes  No

4. Does your work require the use of creativity, invention, or imagination in a recognized field of artistic endeavor?  
 Yes  No

5. Is your work predominantly intellectual and varied in character rather than routine mental, manual, mechanical or physical work?  
 Yes  No

**SECTION 5.4: EXECUTIVE DUTIES**

*Only complete this section if you selected **Executive** in Section 5.0. Function within the Organization. Next, skip to Section 6.0. Educational Preparation.*

7. Does your work require the use of creativity, invention, or imagination in a recognized field of artistic endeavor?  
 Yes  No

8. Is your work predominantly intellectual and varied in character rather than routine mental, manual, mechanical or physical work?  
 Yes  No

**SECTION 6.0: EDUCATIONAL**

1. What level of education is required for your position?  
 Some high school education  Completion of a Bachelor's degree  
 Completion of high school/GED  Some graduate school education  
 Some college education  Completion of a Master's degree  
 Completion of an Associate's degree  Completion of a Doctorate degree

2. What certifications, licenses, or professional designations, if any, are required for your position?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

3. What certifications, licenses, or professional designations, if any, are preferred for your position?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**SECTION 7.0: EXPERIENCE**

1. How much experience is required for your position?  
 No experience required  3 years  7 years  
 6 months  4 years  8 years  
 1 year  5 years  9 years  
 2 years  6 years  +10 years

2. Can education be substituted for experience?  
 Yes  No  Do not know

3. Can experience be substituted for education?  
 Yes  No  Do not know

- Setting and adjusting pay rates and work hours
- Directing the work of employees
- Conducting performance appraisals
- Handling employee complaints and grievances
- Disciplining employees
- Planning work and apportioning the work among the employees
- Running or servicing an organization, such as determining the items to be bought, stocked, and sold
- Planning and controlling the budget
- Monitoring or implementing legal compliance measures
- Yes  No

2. Do you have the authority to hire and fire employees or do you provide suggestions or recommendations regarding hiring, firing, and advancement decisions, which are given weight in the decision-making process?  
 To determine weight, consider the following factors:

- The degree to which your duties require making suggestions and recommendations
- The frequency with which suggestions and recommendations are made or requested
- The frequency with which your suggestions and recommendations are relied upon

*Notes:* You need not have authority to make the ultimate decision. Suggestions and recommendations may be reviewed by a higher level manager.

Yes  No

3. Do you regularly direct the work of two or more full-time employees?  
 Yes  No

4. Do you decide when to perform non-management duties, and when performing such duties do you remain responsible for the success or failure of the organization's operation?  
 Yes  No

5. Are you a shift manager or leader?  
*Typically, a shift manager is not responsible for success or failure of the business operation, but rather directs employees while also performing similar work to the employees.*  
 Yes  No

6. Does your primary duty consist of work requiring advanced knowledge in a field of science or learning acquired by a prolonged course of specialized intellectual instruction as distinguished from a general academic education?  
 Consider the following factors and definitions before answering yes or no.

- "Advanced knowledge" means work that is predominately intellectual in character, and which includes work requiring the consistent exercise of discretion and judgment
- Advanced knowledge is generally used to analyze, interpret or make deductions from varying facts or circumstances
- Advanced knowledge cannot be attained at the high school level
- "Prolonged course of specialized intellectual instruction" means that the learned professional exemption is limited to professions where specialized, academic training is a standard prerequisite for entering the profession

Yes  No

III. WORK PERFORMED, RESPONSIBILITY AND LEADERSHIP, COMMUNICATION, AND DECISION-MAKING JOB FACTORS	
SECTION 8.0: WORK PERFORMED	
Please read each statement below and check the one that is the <u>closest match</u> to your major job duties.	
CLOSEST MATCH	FACTOR
	Perform clerical or manual tasks <b>Example:</b> May copy, compile, maintain basic files systems or enter data, or compute data using addition, subtraction, multiplication, and division; or compare items against a standard; or operate light equipment such as lawn mowers, floor buffers, pickup truck, van; or perform general housekeeping/custodial duties.
	Perform clerical or manual tasks involving intensive understanding of a field, unit or division <b>Example:</b> May summarize, tabulate, or format data or information, or gather data and information for later evaluation; or perform arithmetic operations including basic geometry or algebra, including computing discounts, interest rates, ratios and/or percents; or uses or operates medium use equipment such as chainsaws, mowing equipment; or journeyman level trades work.
	Perform specialized technical work involving data collection, evaluation, analysis, and troubleshooting, or reports on operations and activities of a department, or performs general coordination of individual or departmental activities <b>Example:</b> May use descriptive statistics, advanced geometry or algebra; requires the use of a wide range of administrative and/or technical methods in the solution of problems; or operate heavy construction equipment; or perform master level trades duties.
	Perform entry level professional work including basic data analysis and synthesis, or report on operations and activities of an organization; or perform quality assurance and compliance activities <b>Example:</b> May use advanced algebra, inferential statistics, and/or financial models.
	Perform professional level work requiring a wide range of administrative, technical, scientific, engineering, accounting, legal, or managerial methods applied to complex problems <b>Example:</b> May plan or direct the sequence of department or division activities
	Perform professional or managerial work including advanced data analysis and synthesis <b>Example:</b> May develop policies, procedures, or methodologies based on new facts or knowledge; or interpret or apply established policies.
	Perform advanced professional work methods to formulate important recommendations or make technical decisions that have an organization-wide impact <b>Example:</b> May require the use of creative ability and resourcefulness in the analysis and solution of complex problems; may develop new approaches or methodologies to solve problems not previously encountered.
	Perform executive or expert professional work to establish policy, long-range plans, and programs, identify funding sources and allocate funds <b>Example:</b> May develop or use theoretical mathematical concepts to formulate new techniques, or make decisions that impact both the organization and the discipline.

SECTION 9.0: RESPONSIBILITY AND LEADERSHIP	
Please read each statement below and check the one that is the <u>closest match</u> to your major job duties.	
CLOSEST MATCH	FACTOR
	Follow instructions or work orders; or read routine sentences, instructions, regulations, or procedures. Follow technical instructions, procedure manuals and charts to solve practical problems, or compose routine or specialized reports or forms and business letters, or ensure compliance with clear guidelines and standards.
	Follow complex technical instructions, solve technical problems, or disseminate information regarding policies and procedures; may compose unique reports or analysis, or provide extensive customer service to internal or external customers.
	Follow complex rules or systems, using professional literature and technical reports; or enforce laws, rules, regulations, or ordinances. Supervise, instruct, or train others through explanation, demonstration, and supervised practice or make recommendations based on technical expertise. May have first-level supervisory duties including administration of performance feedback, or coordinate work activity schedules for teams.
	Direct, manage, or lead others; may determine work procedures, assign duties, maintain harmonious relations, or promote efficiency; may develop and administer operational programs; or may write or present extremely complex papers and reports.
	Formulate and issue policies, procedures, and instructions; responsible for long term planning within an agency, department or division.
	Guide organization-wide development; leads the development of organization mission, vision, and principles; directs capital improvement initiatives.

SECTION 10.0: COMMUNICATION	
Please read each statement below and check the one that is the <u>closest match</u> to your major job duties.	
CLOSEST MATCH	FACTOR
	Communicate using routine sentences, complete routine job forms and incident reports, or communicate routine information regarding daily activities.
	Communicate to convey or exchange general work-related information or service to internal or external customers.
	Communicate information to guide or assist people; may give instructions or assignments to helpers or assistants.
	Communicate with internal and external groups; write manuals and complex reports, persuade or influence others in favor of a service, point of view, or course of action.
	Communicate information among co-workers, customers, vendors, and management; or speak before professional and civic groups; may write complex articles and reports or develop presentations for specialized audiences; may read scientific or technical journals or reports.
	Communicate with operational and functional leaders; read and interpret professional materials involving advanced bodies of knowledge.
	Communicates through negotiation and consensus building to exchange ideas, information, and opinions or develop decisions, conclusions, or solutions.
	Communicate with key stakeholders to affect long term planning and to secure organization position and resources.

SECTION 11.0: DECISION-MAKING	
Please read each statement below and check the one that is the closest match to your major job duties.	
CLOSEST MATCH	FACTOR
	Perform routine or semi-routine work under direct supervision. Requires very few decisions, affecting only the individual.
	Perform semi-routine work involving set procedures, but which may require problem-solving, serve clients or co-workers, or respond to requests. Requires some decisions that affect a few co-workers.
	Perform semi-skilled work involving some set procedures and frequent problem-solving. Requires frequent decision making affecting co-workers or the general public; may be responsible for providing information to those who depend on a service.
	Perform skilled work involving almost constant problem solving. May be responsible for actions of others, requiring almost constant decisions affecting co-workers, clients or others in the general public.
	Perform coordinating work involving guidelines and rules with constant problem-solving. May be responsible for actions of others requiring development of procedures and constant decisions affecting subordinate workers, clients, or others in the general public.
	Perform management and supervisory work involving policy and guideline interpretation, solving both people and work-related problems. Decision-making is a significant part of job, affecting a large segment of the organization and the general public.
	Perform advanced professional work involving the application of principles of logical thinking to diagnose or define problems, collect data and solve abstract problems with widespread unit or organization impact. Work in a highly dynamic environment, responsible to establish goals, objectives and policies.
	Perform executive work involving the application of broad principles of professional management and leadership to new problems for which conventional solutions may or may not exist. Responsible for long-range goals, planning, and methodologies; works in an evolving environment with emerging knowledge and technologies, competing priorities, and changing politics.

IV. FINANCIAL AUTHORITY, TOOLS AND EQUIPMENT, AND PHYSICAL LABOR FACTORS	
SECTION 12.0: FINANCIAL AUTHORITY	
1.	<p>Please read each sentence below and select all factors that represent the financial authority your job entails. (Check all that apply.)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> None/Not Applicable</li> <li><input type="checkbox"/> Handle cash transactions; prepare and process purchase orders.</li> <li><input type="checkbox"/> Bill or reconcile records, including departmental budget records and other related information such as subcontracts.</li> <li><input type="checkbox"/> Manage inventory, property, or loss control.</li> <li><input type="checkbox"/> Administer benefits by determining individual eligibility and coverage levels or determining compensation levels.</li> <li><input type="checkbox"/> Authorized to purchase goods or services worth more than \$100 without securing approval from another authority or able to make recommendations that impact resource allocation.</li> <li><input type="checkbox"/> Manage or administer budget within assigned department.</li> <li><input type="checkbox"/> Budget or allocate funds within or across departments or divisions.</li> </ul>
SECTION 13.0: TOOLS AND EQUIPMENT	
1.	<p>Please read each statement below and select all factors that represent the tools or equipment you use to perform your job. (Check all that apply.)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> None/Not Applicable</li> <li><input type="checkbox"/> Use office machines such as copiers or calculators.</li> <li><input type="checkbox"/> Use computers for data entry, or handle, use, or repair hand-held power equipment or light machinery.</li> <li><input type="checkbox"/> Use computers for word processing, spreadsheets, PowerPoint presentations or custom applications.</li> <li><input type="checkbox"/> Use, develop, or repair electronics or complex software, hardware, or network systems; operate, install, test or inspect heavy or complex machinery.</li> <li><input type="checkbox"/> Supervise the activities of those operating or repairing complex machinery or technology systems.</li> <li><input type="checkbox"/> Interpret policy and establish methods and procedures for acquiring, installing, testing, operating or repairing machinery or technology systems.</li> <li><input type="checkbox"/> Establish policy for the acquisition, installation, testing, operation, and maintenance of machinery or technology systems.</li> <li><input type="checkbox"/> Establish long-range plans and programs for capital improvements, major construction projects, or new technology systems.</li> </ul>

**SECTION 14.6: PHYSICAL JOB FACTORS**

Please provide details for the working conditions and physical demands that are required to successfully perform your job.

1. Which of the following physical conditions and hazards are encountered in your position? (Check all that apply.)

- Indoor environment
- Outdoor environment
- Noise
- Extreme temperatures
- Vibration
- Moisture and/or humidity
- Dust
- Fumes
- Gases
- Poor ventilation
- Electrical hazards
- Mechanical hazards
- Chemical hazards
- Explosive hazards
- Burn hazards
- Potential for violence/physical altercations
- Other \_\_\_\_\_
- Other \_\_\_\_\_

2. How much time is spent doing the following activities in your position?  
*Example: Position requires sitting over 2/3 of the time.*

ACTIVITY	NONE	AMOUNT OF TIME SPENT		
		UNDER 1/3	1/3 TO 2/3	OVER 2/3
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gripping or feeling with hands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching with hands and arms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing or balancing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stooping, kneeling, crouching, or crawling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talking or hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasting or smelling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Does this job require that weight be lifted? If so, how much and how often?  
*Example: Position requires lifting up to 25 pounds over 2/3 of the time.*

PHYSICAL REQUIREMENTS: WEIGHT LIFTED	NONE	AMOUNT OF TIME SPENT		
		UNDER 1/3	1/3 TO 2/3	OVER 2/3
Up to 10 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 25 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 100 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 100 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Does this job have any special vision requirements? (Check all that apply.)

- No special vision requirements
- Close vision (clear vision at 20 inches or less)
- Distance vision (clear vision at 20 feet or more)
- Color vision (ability to identify and distinguish colors)
- Peripheral vision (ability to observe an area that can be seen up or down or to the left and right when vision is fixed on a given point)
- Depth perception (three-dimensional vision, ability to judge distances and spatial relationships)
- Ability to adjust focus (ability to adjust the eye to bring an object into sharp focus)

**SUPERVISOR'S COMMENTS**

Supervisor Instructions:  
 Please review your employee's questionnaire carefully and check if you agree or disagree with the employee's choices or statements. Note any additional information that you feel is important to the understanding of this employee's work. If you disagree with any of the levels checked or statements made in this questionnaire, we ask that you do not change any response nor ask the employee to change a response. Rather, please indicate your comments on this page. If you need additional room, please add a page and staple it to this questionnaire. Each section must be reviewed. Failure to review each section thoroughly and to complete this section of the questionnaire will result in a delay in the evaluation process. Thank you for your time and attention to this process.

SECTION	AGREE	DISAGREE	COMMENTS
1.0	<input type="checkbox"/>	<input type="checkbox"/>	
2.0	<input type="checkbox"/>	<input type="checkbox"/>	
3.0	<input type="checkbox"/>	<input type="checkbox"/>	
4.0	<input type="checkbox"/>	<input type="checkbox"/>	
5.0	<input type="checkbox"/>	<input type="checkbox"/>	
6.0	<input type="checkbox"/>	<input type="checkbox"/>	
7.0	<input type="checkbox"/>	<input type="checkbox"/>	
8.0	<input type="checkbox"/>	<input type="checkbox"/>	
9.0	<input type="checkbox"/>	<input type="checkbox"/>	
10.0	<input type="checkbox"/>	<input type="checkbox"/>	
11.0	<input type="checkbox"/>	<input type="checkbox"/>	
12.0	<input type="checkbox"/>	<input type="checkbox"/>	
13.0	<input type="checkbox"/>	<input type="checkbox"/>	
14.0	<input type="checkbox"/>	<input type="checkbox"/>	

Additional Comments:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

I certify that I have read and reviewed this questionnaire and that I have noted any additional information or areas of disagreement to the best of my ability.

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# Appendix B. Sample MIP

MANAGEMENT ISSUES PAPER®																				
<p>This tool is designed to collect information about specific concerns that you may have related to your organization's current compensation and classification system. The information that you submit will be used to assist MGT of America Consulting, LLC in the overall position evaluation and to make recommendations for updating and improving the current system.</p>																				
<p>Your Name _____ Your Classification Title _____</p>																				
<p>Department Name _____</p>																				
MANAGEMENT ISSUE DETAIL																				
<p>I. OFFICIAL CLASSIFICATION TITLE (JOB TITLE) RELATED TO THE ISSUE: _____</p>																				
<p>II. EMPLOYEES IN CLASS RELATED TO THE ISSUE:  <i>List names of class incumbents. Use back of page for additional space if necessary.</i></p> <p>_____</p> <p>_____</p> <p>_____</p>																				
<p>III. DESCRIPTION/RESOLUTION OF THE ISSUE:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #555; color: white;"> <th style="width: 15%; padding: 5px;">CHECK ALL THAT APPLY</th> <th style="width: 40%; padding: 5px;">NATURE OF ISSUE</th> <th style="width: 45%; padding: 5px;">RECOMMENDED RESOLUTION</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">Recruitment/Retention of qualified employees</td> <td style="padding: 5px;"></td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">Current Pay Grade/Salary Range should be revised/updated</td> <td style="padding: 5px;">Recommended New Pay Grade or Salary Range:</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">Classification Title should be revised/updated</td> <td style="padding: 5px;">Recommended New Title:</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">Career Path/Advancement for this Classification</td> <td style="padding: 5px;">Recommended New Series or Advancement Level:</td> </tr> <tr> <td style="text-align: center; padding: 5px;"><input type="checkbox"/></td> <td style="padding: 5px;">Other (briefly describe)</td> <td style="padding: 5px;"></td> </tr> </tbody> </table>			CHECK ALL THAT APPLY	NATURE OF ISSUE	RECOMMENDED RESOLUTION	<input type="checkbox"/>	Recruitment/Retention of qualified employees		<input type="checkbox"/>	Current Pay Grade/Salary Range should be revised/updated	Recommended New Pay Grade or Salary Range:	<input type="checkbox"/>	Classification Title should be revised/updated	Recommended New Title:	<input type="checkbox"/>	Career Path/Advancement for this Classification	Recommended New Series or Advancement Level:	<input type="checkbox"/>	Other (briefly describe)	
CHECK ALL THAT APPLY	NATURE OF ISSUE	RECOMMENDED RESOLUTION																		
<input type="checkbox"/>	Recruitment/Retention of qualified employees																			
<input type="checkbox"/>	Current Pay Grade/Salary Range should be revised/updated	Recommended New Pay Grade or Salary Range:																		
<input type="checkbox"/>	Classification Title should be revised/updated	Recommended New Title:																		
<input type="checkbox"/>	Career Path/Advancement for this Classification	Recommended New Series or Advancement Level:																		
<input type="checkbox"/>	Other (briefly describe)																			
<p>IV. BACKGROUND OF THE ISSUE:  <i>Briefly describe the nature of the issue(s) checked in Part III:</i></p> <p>_____</p> <p>_____</p> <p>_____</p> <p><i>Are other related classifications comparable to this classification in terms of required skill, effort, responsibility, or working conditions? Please list titles and pay grades.</i></p> <p>_____</p> <p>_____</p> <p>_____</p>																				

# Appendix C. Resumes



## BRANDON W. LEDFORD, SHRM-SCP, MPP, PMP

*Senior Vice President, Human Capital Solutions Group*

MGT CONSULTING GROUP

Mr. Ledford is responsible for driving the growth and execution of MGT's organizational solutions group, which includes classification and compensation/salary studies, policy and procedure development, organizational reviews, and best practice research. For over fifteen years, he has assisted global clients in all industries with human capital, public policy, management consulting, revenue performance management, strategy, business transformation, data analytics, diversity, equity, and inclusion, and strategic communications.



Prior to joining the MGT leadership team, he was the Vice President overseeing the Human Resources and Policy and Compliance departments of a global technology company and has been a consultant for both Booz Allen Hamilton and Deloitte. Mr. Ledford also has interned for the U.S. Supreme Court and White House Office of Science and Technology Policy. He holds a Master of Public Policy from George Mason University's School of Public Policy, a Bachelor of Arts from the Pennsylvania State University, is a certified Project Management Professional (PMP) and Prosci Change Manager and earned an Innovation and Entrepreneurship Certificate from Stanford.

### Areas of Expertise

- ◆ Human Capital
- ◆ Business Transformation
- ◆ Data Analytics
- ◆ Public Policy
- ◆ Strategic Communications
- ◆ Strategy

### Education

M.P.P., Health Policy, Science and Technology Policy, George Mason University, 2011

B.A., Comparative Literature, Latin, The Pennsylvania State University, 2006

Innovation and Entrepreneurship Certificate, Stanford University, 2020

Society of Human Resources Management, Senior Certified Professional (SHRM-SCP), February 2021

Prosci Change Management Certificate, February 2020

Project Management Professional (July 2013 – Present)

Lean Six Sigma Yellow Belt (August 2012 – Present)

### Honors

**The Horatio Alger Scholarship, four consecutive years**

**Martha V. and Walter A. Pennino Endowed Scholarship**

**American Cancer Society Champion College Scholarship**

**Carolyn's Compassionate Children Scholarship**

**The Harry W. Klinger University Scholarship, four consecutive years**

**The Brandon Ledford Scholarship**

### Sample of Relevant Project Experience

- Adams 14 School District (CO) | School Turnaround
- Antelope Valley College District (CA) | Classification and Compensation Study
- Beaufort County School District (SC) | Needs Assessment
- Brevard County School Board (FL) | Districtwide Compensation Study
- Centre Area Transportation Authority (PA) | Classification and Compensation Study
- CF Solutions | Classification and Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- City of Gainesville (FL) | Executive Recruiting
- Gogebic County (MI) | Classification and Compensation Study
- Green River College (WA) | Classification and Compensation Study
- Gulf Coast State College (FL) | Compensation and Class Study
- Gwinnett County Public Library (GA) | Compensation Plan Evaluation Services
- Harford County Public Schools (MD) | Compensation and Benefits Study



## BRANDON W. LEDFORD, SHRM-SCP, MPP, PMP

*Senior Vice President, Human Capital Solutions Group*

MGT CONSULTING GROUP

- City of Hermiston (OR) | Classification and Compensation Study
- City of Stockton (CA) | Equity Assessment, Commercial Cannabis Program
- City of Toledo (OH) | Disparity Study
- City of Woodinville (WA) | Classification and Compensation Study
- Colorado Division
- Colorado School of Mines | Job Architecture and Pay Equity Consulting
- County of Charles (MD) | Operational and Organizational Assessment
- County of Glades (FL) | Employee Policy and Handbook Development
- County of Jackson (OR) | Classification and Compensation Study
- County of Lancaster (SC) | Classification and Compensation Study
- County of Maricopa (AZ) | Human Resources Services
- County of Maricopa (AZ) | Rate Methodologies & Recommendations
- County of Maui (HI) | Performance Audit
- County of Ouray (CO) | Classification and Compensation Review and Update
- County of York (SC) | Ongoing Classification and Compensation Services
- Dallas Area Rapid Transit (TX) | Benefits Assessment
- Disability Rights Florida | Classification and Compensation Study
- East Central College (MO) | Compensation and Classification Study
- Florida Atlantic University | Organizational Assessment
- Florida Department of Education | Review of Florida Safe School Assessment Tool
- Florida Development Disabilities Council | Classification and Compensation Study
- Florida Office of Program Policy Analysis and Government Accountability | Florida Clerks of Court Organizational Review
- Hawaii Health Systems Corporation | Classification and Compensation Study; Executive Performance Review System Design
- Hillsborough Area Regional Transportation Authority (FL) | Classification and Compensation Study
- Hillsborough Community College (FL) | Administrator Classification and Compensation Study
- Horry County Schools (SC) | Classification and Compensation Study
- Indiana Department of Administration | School Corporation Emergency Management Services
- Lancaster County (SC) | Classification and Compensation Study
- Maryland Environmental Service | Classification and Compensation Study
- Navajo Nation | Compensation Study
- North Carolina Education Lottery | Compensation and Classification Study
- Orleans Parish School Board (LA) | Diversity, Equity, and Inclusion Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Santa Fe College (FL) | Classification and Compensation Study
- Sault Tribe (MI) | Classification and Compensation Study
- Southern Nevada Regional Housing Authority | Classification and Compensation Study
- State of Colorado | Organizational Review; Training
- Tampa Bay Partnership (FL) | Organizational Review
- Tampa Bay Water (FL) | Compensation and Classification Study
- Texas Southmost College | Market Surveys and Evaluations
- University of Nevada, Las Vegas | Strategic Planning
- Washington Suburban Sanitary Commission (MD) | Consulting Services for a Disparity Study
- West Shore Community College (MI) | Compensation and Classification Study



## SHEENA HORTON, PMP

*Director*

MGT CONSULTING GROUP

Ms. Horton is a certified Project Management Professional (PMP) and provides oversight and project management for MGT's human capital projects. She has significant experience conducting classification and compensation studies, organizational reviews, program/performance evaluations, needs assessments, program/service realignments, policy development, best practices research, strategic planning, and business process analyses. In addition to her work on human capital projects, Ms. Horton also has assisted other MGT practices with student housing studies, facilities and education suitability assessments, student literacy and school safety program evaluations, and community engagement projects. She holds a Master of Science degree from Florida State University's School of Criminology and Criminal Justice, and two Bachelor of Arts degrees from the University of North Carolina at Greensboro in Sociology with a Criminology concentration and in English. Ms. Horton currently serves on the Southeast Evaluation Association's Board as Outreach Chair and is a former President of the Association. She also is regularly involved with the American Evaluation Association's Topical Interest Groups and AEA365 blog.



### Education

M.S., Criminology and Criminal Justice, Florida State University, 2008

B.A., Sociology with a concentration in Criminology, English, University of North Carolina-Greensboro, 2004

### Sample of Relevant Project Experience

- Antelope Valley College District (CA) | Classification and Compensation Study
- Bastrop County (TX) | Classification and Compensation Study
- Brevard Public Schools (FL) | Compensation Study
- Centre Area Transportation Authority (PA) | Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- City of Hermiston (OR) | Classification and Compensation Study
- City of Kingsport (TN) | Classification and Compensation Study
- City of New York (NY) | Disparity Study
- City of Portsmouth (VA) | General Employees' Pay Study Phase I & II
- City of Woodinville (WA) | Classification and Compensation Study
- Colorado School of Mines | Job Architecture and Pay Equity Consulting
- County of Galveston (TX) | Galveston County Sheriff's Office Compensation Review
- County of Gogebic (MI) | Classification and Compensation Study
- County of Jackson (OR) | Classification and Compensation Study

### Professional Affiliations

**American Evaluation Association, 2011–Present**

**Southeast Evaluation Association, 2001–Present**

**Project Management Institute, 2015–Present**

**RTP Evaluators, 2019–Present**

- Gulf Coast State College (FL) | Compensation and Classification Study
- Gwinnett County Public Library (GA) | Compensation Plan Evaluation Services
- Harford County Public Schools (MD) | Compensation and Benefits Study
- Hawaii Health Systems Corp | Classification and Compensation Studies
- Hillsborough Area Regional Transportation Authority (FL) | Classification and Compensation Study
- Hillsborough Community College (FL) | Classification and Compensation Study
- Horry County Schools (SC) | Classification and Compensation Study
- Indiana Department of Administration | School Corporation Emergency Management Services
- Maricopa County Sheriff's Office (AZ) | Internal Affairs Staffing Study
- Maryland Environmental Service | Classification and Compensation Study
- Navajo Nation (AZ) | Classification and Compensation Study
- North Carolina Education Lottery | Classification and Compensation Study
- Oconee County (SC) | Position Evaluations and Job Descriptions; Compensation and Classification Study



## SHEENA HORTON, PMP

*Director*

MGT CONSULTING GROUP

- County of Kerr (TX) | Compensation/Classification Study
- County of Klamath (MI) | Classification/Compensation and Equal Pay Studies
- County of Lancaster (PA) | Total Compensation Study
- County of Lancaster (SC) | Classification and Compensation Study
- County of Maricopa (AZ) | Rate Methodologies and Recommendations
- County of Ouray (CO) | Classification and Compensation Review and Update
- County of St. Clair (MI) | Peer Selection Compensation Study
- County of York (SC) | Classification and Compensation Study (2); Pay Grade, FLSA Review, & Job Description; Classification/Compensation Updates
- Disability Rights Florida | Classification and Compensation Study
- East Central College (MO) | Compensation Study
- Florida Developmental Disabilities Council | Classification and Compensation Study
- Florida Department of Education | Review of Florida Safe School Assessment Tool
- Florida Transportation Commission | Management Salary Compensation Study
- Green River College (WA) | Classification and Compensation Study
- Ohio Department of Education | Evaluator of the Ohio Teacher Evaluation System Pilot Program
- Office of Program Policy Analysis and Government Accountability (OPPAGA) (FL) | Organizational Review of Florida Clerks
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Rhode Island Student Loan Authority | Compensation and Benefit Study
- Santa Fe College (FL) | Classification and Compensation Study
- Sault Tribe (MI) | Classification and Compensation Consulting Services
- South Carolina Education Lottery | Classification and Compensation Plan
- Southern Nevada Regional Housing Authority | Classification and Compensation Study
- Southwest Vermont Supervisory Union | Organizational Review
- State of Colorado | Organizational Review
- Tampa Bay Water (FL) | Classification and Compensation Study
- Texas Legislative Budget Board (6 ISDs) | Student Behavior Management Performance Review
- Texas Southmost College | Market Surveys and Evaluations
- University System of Georgia | South Georgia Needs Assessments
- West Shore Community College (MI) | Compensation and Classification Study



## FRED SEAMON, Ph.D.

*Executive Vice President*  
MGT CONSULTING GROUP

Dr. Seamon has over 35 years of consulting, research, and graduate teaching experience. He has extensive knowledge in analyzing the structure, operations, and processes of public sector organizations and nonprofit agencies and in conducting studies related to access, equity, and disparities in education, business, and human services. Dr. Seamon has a wide variety of experience that includes training design, development, and delivery, organizational development, program evaluation, program auditing, and performance management in workforce development, developmental disabilities, and community philanthropy. He served as a faculty member and in administrative roles at Florida State University (FSU) for over 12 years and was adjunct faculty at Florida A&M University for 14 years.



Dr. Seamon has been involved in numerous management efficiency studies and performance reviews for local governments as well as nonprofit organizations and is widely recognized for his expertise in organizational development. While on the faculty of the Askew School of Public Administration and Public Policy at FSU, he was called upon regularly to provide a variety of technical assistance to local government agencies in Florida and other states. He taught graduate courses in organizational development and helped shape the career of former students who now work in local government.

His experience also includes providing consulting services to workforce development boards and entities and delivering board development, strategic planning, and technical assistance to a variety of boards and organizations. Dr. Seamon has participated in many projects dealing with workforce development, economic development, and other health and human services systems.

### Areas of Expertise

- ◆ Qualitative research methods
- ◆ Community engagement and outreach
- ◆ Policy analysis
- ◆ Analyzing the structure, operations, and processes of public sector organizations and nonprofit agencies.
- ◆ Conducting research studies related to diversity, equity, and disparities in education, business, and human services.

### Education

Ph.D., Higher Education Administration, College of Education, Florida State University, 1976  
M.S.W., School of Social Work, Florida State University, 1973  
B.S., Sociology, Bethune-Cookman College, 1970  
Certified Mediator, Certified by Supreme Court of Florida, #06465c

### Professional Affiliations

**American Evaluation Association**  
**American Society of Public Administration**  
**Florida Academy of Certified Mediators**  
**Florida Advisory Council on Small and Minority Business Development**  
**International Personnel Management Association**  
**National Association of Workforce Development Professionals**  
**National Forum for Black Public Administrators**

### Sample of Relevant Project Experience

- Alabama A&M University | Financial Assessment
- Anderson Housing Authority (SC) | Personnel Study
- Bethune-Cookman College (FL) | Review of Booster Organization; Review of College Registration Process
- Indian River State College (FL) | Homeland Security Program Needs Assessment
- Kentucky State University | Strategic Plan for Expansion of Academic Program



## FRED SEAMON, Ph.D.

---

*Executive Vice President*

MGT CONSULTING GROUP

- California Employment Development Department | Career Ladder Training Evaluation
- City of North Miami (FL) | Fair Labor Standards Act Audit; Human Resources Study
- City of Richmond Hill (GA) | Compensation and Classification Study
- City of Tallahassee (FL) | Work Environment Assessment
- Edward Waters College (FL) | Organizational Review for Edward Waters College
- Florida A&M University | Comprehensive Training Plan and Organization Structure Review
- Florida Department of Economic Opportunity | Developing Performance Measures
- Florida Gulf Coast University | EEO Training Sessions
- Florida Office of the Governor | Merger of Three Agencies into a New Department of Economic Opportunity
- Florida Polytechnic University | Analysis of Faculty Contracting Practices
- Miami-Dade Expressway Authority (FL) | Executive Search
- Mobile Public Schools (AL) | Mobile County Schools Employee Compensation Plan
- Norfolk State University (VA) | Strategic Planning Consulting Services
- Ounce of Prevention Fund (FL) | Personnel Policies Update
- Saint Paul's College (VA) | Economic Impact Study
- University of Arkansas at Pine Bluff | Strategic Plan Development
- University of the District of Columbia | Comprehensive Assessment for the University of the District of Columbia
- Virginia Commonwealth University | Comprehensive Organizational Assessment and Improvement Review and Report of Offices of EEO/AA, Faculty/Staff Ombudsman, and Diversity
- Virginia State University | Strategic Planning
- Workforce Central Florida | Employer Study Plan and Update
- Workforce Plus (FL) | Salary Study and Update





## LAMONT BROWNE, Ed.D.

*Vice President, Client Services*

MGT CONSULTING GROUP

Dr. Lamont Browne is an accomplished systems and people leader with a diverse background as a public school administrator, corporate trainer, and team leader. education. Dr. Browne was educated at the University of Delaware, earning a Bachelor of Science degree in Business Administration, a Master’s degree in Education, and a Doctoral degree in Educational Leadership. He also attended the University of Colorado where he earned an MBA.



He is a strong educational, business, diversity, and talent leader, and is a change agent focusing on quality, equity, and inclusivity. He excels in utilizing a data-driven analytical approach and high EQ to develop high functioning teams who work collaboratively to design and implement strategic systems that enhance academic and organizational performance. He is nationally recognized as an award-winning education leader for being performance driven, leadership development, and achieving results that improve school systems and the advancement of marginalized peoples and communities.

### Areas of Expertise

- ◆ Entrepreneurial Leadership
- ◆ Business Strategy
- ◆ Leadership Development
- ◆ Turnaround Leadership
- ◆ Organizational Culture
- ◆ Building Diverse / Inclusive Teams
- ◆ Community Engagement
- ◆ Strategy Development
- ◆ Partnerships / Fundraising
- ◆ Executive Communication
- ◆ People / Career Development
- ◆ Cross-functional Collaboration

### Education

Master of Business Administration, University of Colorado  
 Doctor of Education: Administration and Policy, University of Delaware  
 Master of Education: Curriculum and Instruction, University of Delaware  
 Bachelor of Science in Business Administration: Finance, University of Delaware

### Awards, Activities, & Accomplishments

**Ryan Award, presented by the Accelerate Institute for “Exceptional leadership in closing the achievement gap in urban K12 schools.”**  
**Order of Excellence, presented by the Delaware State BOE for “Outstanding contributions toward the growth and betterment of the students served through Delaware Public Education.”**  
**Merit Award, presented by the Delaware Secretary of Education for “Making a distinctive contribution to the educational program of Delaware.”**  
**Impact Award, presented by the Delaware Charter Schools Network for “Being a visionary for significant educational improvements who inspires others while utilizing innovative or creative approaches while addressing a compelling student need**

### Sample of Relevant Project Experience

- Adams 14 School District (CO) | School Turnaround Services
- Antelope Valley College District (CA) | Classification and Compensation Study
- Colorado School of Mines | Classification and Compensation Study
- Johnson County Community College (KS) | Diversity, Equity, and Inclusion Study
- Sault Tribe (MI) | Classification and Compensation Study



## LEON CORBETT, PMP

*Director*

MGT CONSULTING GROUP

Mr. Corbett, a Director for MGT and a certified Project Management Professional, has 20 years of professional experience in government operations, finance, and public-private partnerships. He is a versatile leader with a unique range of public sector management experience in state and local government, transportation, and tourism sectors. His recent experience with MGT reflects his adeptness in a full spectrum of services and project management responsibilities as well as a keen ability to grasp the diverse functional units of organizations. He has served as MGT's project manager for numerous organizational assessments for state and local government and higher education clients. **His recommendations in 2020 to reorganize the Texas A&M Agrilife Marketing and Digital Education functional units were successfully implemented.** In 2019 he led a complex statewide efficiency study to help modernize the operations of the Florida Clerks of Court, managing a team of more than 20 consultants and coordinating site visits to 15 Florida counties. He has helped local governments improve cost of services recovery through user fee studies and served as a consultant for a university system needs assessment and several university housing market demand studies.



His past public sector expertise in funding, finance, public-private partnerships (P3s), and marketing yielded successful projects throughout Florida. Prior to joining MGT, he worked as the Project Finance Manager for the Florida Department of Transportation on a full spectrum of transportation projects, focused on innovative finance and project delivery mechanisms.

### Areas of Expertise

- ◆ Project Management
- ◆ Public-Private Partnerships (P3s) and Innovative Financing and Funding Strategy
- ◆ Market Demand Analysis
- ◆ Organizational Efficiency and Effectiveness
- ◆ Project Finance and Financial Policy Planning
- ◆ User Fees, Tolling, and Value Capture Strategies
- ◆ Resource Allocation and Needs Assessment

### Education

M.B.A., Florida State University, 2005

B.A., Wake Forest University, 1996

### Certifications and Training

Project Management Professional, Project Management Institute, Tallahassee, Florida, 2018

Florida Department of Transportation Graduate Leadership Academy, Orlando, Florida, 2017

Florida Certified Contract Manager, Tallahassee, Florida, 2015

Florida Department of Transportation Leadership Academy, Orlando, Florida, 2015

Wharton School of Business Transportation Executive Program, Philadelphia, Pennsylvania, 2012

### Work Experience

MGT of America Consulting, LLC, Director, September 2018 – Present

Florida Department of Transportation, Project Finance Manager, 2008-2018

VISIT FLORIDA, Official Tourism Marketing Corporation for State of Florida, Advertising and Direct Marketing Director, 2000-2008

Ralph Simpson & Associates, Inc. Public Relations Firm, Associate

### Project Experience



## LEON CORBETT, PMP

*Director*

MGT CONSULTING GROUP

- Beaufort County School District (SC) | Needs Assessments
- Bowie State University (MD) | Student Housing Study
- City of Dallas (TX) | User Fee Study
- City of Littleton (CO) | User Fee Study
- City of Long Beach (CA) | Mandated Cost Study (SB90)
- City of Plano (TX) | Neighborhood and Linear Parks Fees Review
- City of Plano (TX) | Parks Impact Fee Study
- City of Redondo Beach (CA) | Mandated Cost Study (SB90)
- City of Safety Harbor (FL) | Building Permit Application Review Fee Study; User Fee Study
- County of Collier (FL) | Performance Audit
- County of Maui (HI) | Performance Audit
- County of Okaloosa (FL) | Cost Allocation Plans
- County of Pinal (AZ) | Staffing Study
- County of Stanislaus (CA) | Mandated Cost Study (SB90)
- East Baton Rouge District Attorney (LA) | Cost Allocation Plan
- Florida Office of Program Policy Analysis and Government Accountability | Organizational Review of Florida Clerks of Court
- Florida Office of Program Policy Analysis and Government Accountability | Performance Audits of Four Counties and Two School Districts
- Greater Cleveland Regional Transit Authority (OH) | Indirect Cost Rate Study
- Louisiana Department of Administration | Statewide Cost Allocation Plan
- Mercer County Community College (NJ) | Student Housing Study
- State of Colorado Department of Human Services | Division of Facilities Management Organizational Review
- Texas A&M University System | Former Student Survey; HUB Procurement Study
- Texas A&M AgriLife | Strategic Plan
- Towson University (MD) | Student Housing Study
- University of Nebraska at Kearney | Student Housing Study
- University of North Carolina System Office | Needs Assessments
- University of Northern Iowa | Market Study
- University of Tennessee | Needs Assessments

### Professional Activities and Presentations

Member, Florida Government Finance Officer Association, 2019

Member, Florida City and County Managers Association, 2019

Presenter, Federal Highway Administration "Every Day Counts" Value Capture Initiative, November 2018

Member, Federal Highway Administration Stakeholder Group on Alternative Contracting Methods, October 2018

Member, Transportation Research Board (TRB), National Cooperative Highway Research Program Panel on "Leveraging Private Capital for Infrastructure Renewal," August 2017-August 2018

Federal Highway Administration Roundtable on Major Surface Transportation Projects, March 2017

National Conference on State Legislatures Southern Fiscal Leaders Conference, September 2016



## TYWANNA MCGEE, CCP, SHRM-CP

*Senior Consultant*

MGT CONSULTING GROUP

Ms. McGee is a Certified Compensation Professional (CCP) with over 15 years' experience in human resources in the public and private sector. Her work experience encompasses local and county government, higher education, and healthcare. She has significant experience conducting classification and compensation studies, market pricing, job analysis, job evaluation, strategic planning, business process analyses, and developing standard operating procedures. In addition to her work in classification and compensation, Ms. McGee has experience in talent acquisition and employee and labor relations. She holds a Master of Science degree from Troy State University, and a Bachelor of Science degree from Florida A&M University. Ms. McGee currently serves as a volunteer for the Center of Independent Living (CIL) which provides resources and accessibility options for people with disabilities.



### Education

M.S., Management & Human Resources, Troy State University

B.S., Public Relations, Florida A&M University

### Training

Pinellas County Government (FL), Supervisory and Management Competencies Series

Orlando Health, Leadership Academy

City of Jacksonville (FL) Citizens Police Academy

### Professional Affiliations

**World at Work, 2014–Present**

### Certifications

**World at Work, Certified Compensation Professional (CCP)**

**SHRM, Certified Professional (SHRM-CP)**

### Sample of Relevant Project Experience

- Antelope Valley College District (CA) | Classification and Compensation Study
- City of Jacksonville (FL) | Collective Bargaining
- Colorado School of Mines | Job Architecture and Pay Equity Consulting
- County of Jackson (OR) | Classification and Compensation Study
- County of Ouray (CO) | Classification and Compensation Review and Update
- Gwinnett County Public Library (GA) | Compensation Plan Evaluation Services
- Orlando Health (FL) | Hospital Integration
- Orlando Health (FL) | Home Health Care Compensation Study
- Pinellas County Government (FL) | Classification and Compensation Study
- Pinellas County Government (FL) | Classification Appeals
- Pinellas County Government (FL) | Job Classification Updates
- Pinellas County Government (FL) | New Employee On-Boarding
- Pinellas County Government (FL) | Position Description Development
- Sault Tribe (MI) | Classification and Compensation Consulting Services
- Southern Nevada Regional Housing Authority | Classification and Compensation Study
- University of Central Florida | Classification and Compensation Study
- University of Virginia | HR Transformation
- University of Virginia | Market Pricing (Academics, College of Medicine & Physician Practices)
- West Shore Community College (MI) | Compensation and Classification Study



## WILLIAM FIORITO

*Consultant*

MGT CONSULTING GROUP

Mr. Fiorito has strong project management and analytical skills and experience in written communications and research. He has experience in performing classification and compensation studies, pay plan and database modeling, survey design and implementation, and market research. His primary responsibilities include obtaining, compiling, and analyzing complex information and data for projects, supporting the project director with project compilation, as well as writing and editing reports.



### Education

M.B.A., Florida State University

B.A., Philosophy, Minor in English, Florida State University

### Professional Affiliations

**Florida State University MBAA**

**Florida State University COB Alumni Association**

### Sample of Relevant Project Experience

- Bedford County (VA) | Pay and Classification Study
- Brevard County School Board (FL) | Districtwide Compensation Study
- Centre Area Transportation Authority (PA) | Classification and Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- City of Dallas (TX) | Availability and Disparity Study
- City of Dayton (OH) | Third Generation Disparity Study
- City of Kingsport (TN) | Classification and Pay Study
- City of Miramar (FL) | Pre-Disparity and Disparity Study
- City of New York (NY) | MWBE Program Availability Analysis; Local Hiring Analysis
- City of Winston-Salem (NC) | Disparity Study
- City of Woodinville (WA) | Employee Job Classification and Compensation Study
- Clark College (WA) | Classification and Compensation Study
- Colorado School of Mines | Job Architecture and Pay Equity Consulting
- County of Klamath (OR) | Classification/Compensation and Equal Pay Studies
- Dallas Area Rapid Transit (TX) | Benefits Assessment
- Dane County (WI) | Review of Racial and Social Equity
- Florida Development Disabilities Council | Classification and Compensation Study
- Florida Lottery | Classification and Compensation Study
- Florida Office of The Attorney General | Salary and Compensation study
- Galveston County (TX) | Sheriff's Office Compensation Review
- Gogebic County (MI) | Classification and Compensation Study
- Government of the District of Columbia | Capability and Capacity Analysis
- Hawaii Health Systems Corporation | Compensation and Classification Study
- Hillsborough Area Regional Transit Authority (FL) | Compensation Study
- Hillsborough Community College (FL) | Administrator Classification and Compensation Study
- Iowa Valley Community College District I Classification and Pay Study
- Lancaster County (PA) | Total Compensation Study
- Navajo Nation | Compensation Study
- North Carolina Education Lottery | Compensation and Classification Study
- North Texas Tollway Authority | Availability and Disparity Study
- Northeast Iowa Community College | Classification and Pay Study
- Oregon Institute of Technology | Faculty Compensation Study
- Osceola County (FL) | Disparity Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study
- Prince George's County (MD) | Availability and Utilization Studies
- Rhode Island Student Loan Authority | Compensation and Benefit Study
- Santa Fe College (FL) | Classification and Compensation Study
- Sault Tribe (MI) | Classification and Compensation Study
- Shelby County Board of Education (TN) | Business Market Availability and Disparity Study
- South Carolina Education Lottery | Classification and Compensation Plan
- Tallahassee Consortium [City, County, Blueprint Agency] (FL) | M/W/SBE Disparity Study



## WILLIAM FIORITO

---

*Consultant*

MGT CONSULTING GROUP

- Green River College (WA) | Classification and Compensation Study
- Gulf Coast State College (FL) | Compensation and Classification Study
- Harford County Public Schools (MD) | Compensation and Benefits Study
- Tampa Bay Water (FL) | Compensation and Classification Study
- Texas A&M AgriLife | Marketing and Communications Organizational and Operational Review; Strategic Plan
- Texas A&M University | Position Descriptions; Performance Audit
- Texas Southmost College | Salary Compensation Study
- York County (SC) | Compensation Study



## KELSEY E. MILLER

*Analyst*

MGT CONSULTING GROUP

Ms. Miller brings strong data analysis, administrative, and research skills to a wide range of projects, with a focus in Human Capital and Education projects. Her education and experience in International Relations has benefited strategic corporate initiatives to reach international clients. Prior to MGT, she worked in several international and local non-profits and political organizations.



### Education

M.A. with honors, International Relations, Central European University, Budapest, Hungary

B.A., Political Science and International Studies, Certificate in European Studies, University of Wisconsin-Madison

### Skills

**Qualitative and quantitative research**

**Data visualization**

**Focus groups**

**Written and verbal communication**

**Job descriptions (FL)SA determinations, and salary benchmarks**

### Sample of Relevant Project Experience

#### **Human Capital Studies**

- Antelope Valley College District (CA) | Classification and Compensation Study
- Brevard County Public Schools (FL) | Compensation Study
- City of Apopka (FL) | Classification and Compensation Study
- City of Woodinville (WA) | Employee Job Classification and Compensation Study
- Colorado School of Mines | Job Architecture and Pay Equity Consulting
- County of Dickinson (MI) | Classification and Compensation Study
- County of Glades (FL) | Employee Handbook and Job Descriptions Updates
- County of Klamath (OR) | Classification/Compensation and Equal Pay Studies
- County of Ouray (CO) | Classification and Compensation Review and Update
- Green River College (WA) | Classification and Compensation Study
- Gwinnett County Public Library (GA) | Compensation Plan Evaluation Services
- Harford County Public Schools (MD) | Compensation and Benefits Study
- Hawaii Health Systems Corporation | Compensation and Classification Study
- Hillsborough Community College (FL) | Administrator Classification and Compensation Study
- Navajo Nation | Compensation Study
- Pittsburgh Public Schools (PA) | Classification and Compensation Study

#### **Other**

- Alaska Department of Transportation and Public Facilities | DBE Disparity Study
- Florida Department of Education | Review of Florida Safe School Assessment Tool
- Florida Office of Program Policy and Government Accountability | Performance Audits: Broward/Collier/Okaloosa/St. Lucie Counties and Alachua/Washington County School Districts
- Guilford County Schools (NC) | School Assignment Optimization and Facility Condition Assessment
- Indiana Department of Administration | Emergency Manager for Gary Community School Corporation
- Maricopa County (AZ) | Rate Methodologies and Recommendations
- Montgomery County | Educational Cluster Facility and Growth Management Plan and Enrollment Forecast
- STEM Revolution | Business Process Management
- Texas A&M University (TX) | Former Student Survey
- Washington Suburban Sanitary Commission (MD) | Consulting Services for a Disparity Study
- Higher Education Market/Housing Studies
- American Campus Communities for UCB | Market Study
- Central Community College (NE) | Market Study
- Daytona State College (FL) | Student Housing Market Study
- Delaware State University | Due Diligence
- Henderson State University (AR) | Student Housing Studies
- Longwood University Real Estate Foundation (VA) | Market Due Diligence



## KELSEY E. MILLER

---

*Analyst*

MGT CONSULTING GROUP

- Rhode Island Student Loan Authority | Compensation and Benefit Study
  - Santa Fe College (FL) | Classification and Compensation Study
  - Sault Tribe (MI) | Classification and Compensation Consulting Services
  - Southern Nevada Regional Housing Authority | Classification and Compensation Study
  - Tampa Bay Water (FL) | Compensation and Classification Study
  - York County (SC) | Position Evaluation, FLSA, and Job Description
  - Louisiana State University Health Sciences Center – New Orleans | Student Housing Studies
  - Montgomery College (MD) | Student Housing Study
  - Portland Public Schools (OR) | Facilities Master Planning
  - Texas A&M University | Off-Campus Market Analysis
  - University of California Berkeley | Student and Faculty-Staff Housing Study
  - University of California Riverside | Due Diligence
  - University System of Georgia | South Georgia Needs Assessment
- Strategic Planning**
- Edina Public Schools (MN) | Strategic Planning
  - Michigan State University | Residential and Hospitality Services Strategic Planning



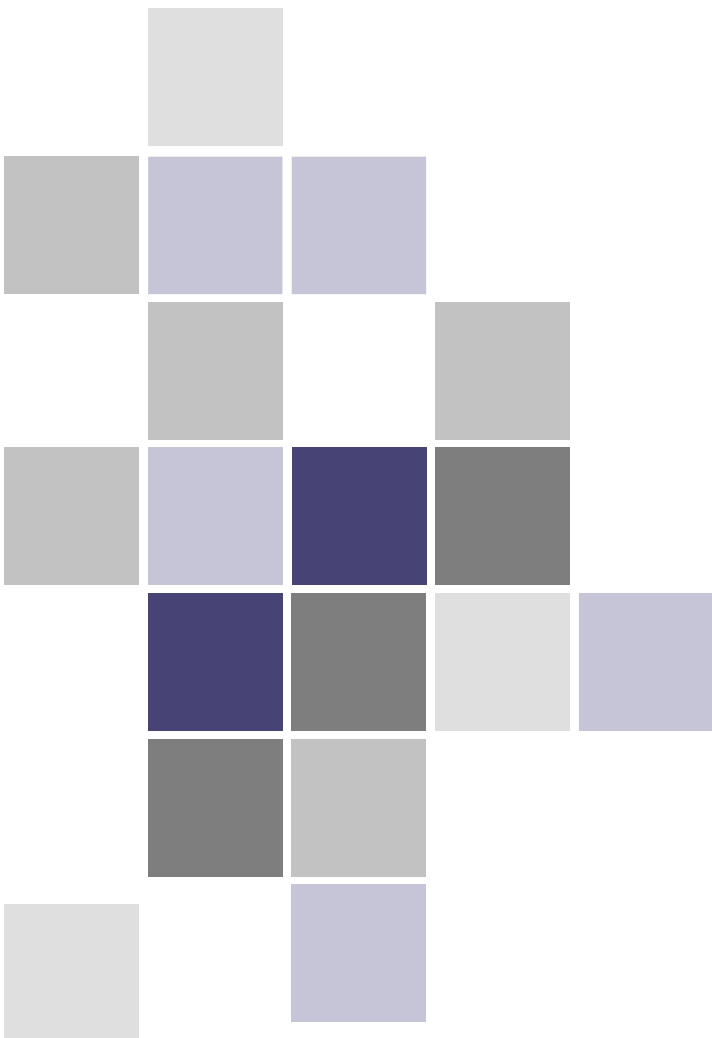
# Appendix D. Sample Report

# CLASSIFICATION AND COMPENSATION STUDY

CITY OF ██████████

## FINAL REPORT

September 10th, 2020



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APPENDIX E: PRE-STUDY PAY SCHEDULE  
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APPENDIX L: LONGEVITY POLICY CHART

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## EXECUTIVE SUMMARY

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The City of [REDACTED] contracted with MGT Consulting Group to conduct a Classification and Compensation study of all [REDACTED]'s employee positions. The study began in February and concluded in September 2020 with completion of the following tasks and subsequent recommendations:

- Reviewed all of [REDACTED]'s 38 unique job classifications and benchmarked classes to comparable market positions in their appropriate recruitment area(s). Recruitment market data reviewed during the study included:

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

- One single pay structure for exempt and non-exempt employees containing 21 total pay grades with 6.25% to 7.15% between each grade split into four grade levels. Further details on these grades are shown below:
  1. **Grades 1-12:** (35% total range spread between minimum and maximum)
  2. **Grades 13-16:** (28% total range spread between minimum and maximum)
  3. **Grades 17-20:** (23% total range spread between minimum and maximum)
  4. **Grade 21:** (City Manager's pay range)
- Calculated implementation costs for adjusting employee base salaries per the identified market rates for classifications reviewed. The total estimated cost for implementation was **\$128,323.46**, which is recommended to be phased in over three years. Year one will bring the seven outlying positions up to the minimum of their ranges. Year two and three will include the remaining adjustments for those who were below the market based on their years of service and benchmark. The City Manager is not recommending implementation of proposed changes to his compensation of \$10,524 at this time, reducing total recommended implementation costs to **\$117,799.46**.

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Additionally, MGT developed implementation and policy strategies tailored to [REDACTED]'s needs to adjust its pay plan and employees to competitive salaries outlined below:

- All employees below the minimum salary of their assigned pay grade (outliers) would be adjusted to the minimum salary as soon as possible.
- All employees receiving proposed adjustments beyond the minimum (based on benchmarks and years of service) would be adjusted to their proposed salary to remain market competitive, provided that they have achieved satisfactory performance reviews.
- All appropriate remaining adjustments should be completed as time and budget allow.
- Additional information and best practice guidelines for initial implementation and for maintenance and administration is provided in the final report, however, some key information can also be found below:
  - The market-as-minimum strategy was designed to address the high cost of living in the area as well as the size and scope of services offered by competing neighboring cities, which likely have greater ability to offer higher compensation.
  - Positions in lower ranges have a wider spread and more steps to allow for more employee growth opportunities and retention support for [REDACTED].
  - Positions above the recommended pay range will not have their salaries reduced.

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## CHAPTER I. INTRODUCTION

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### I.I BACKGROUND

The City of ██████ contracted with MGT Consulting Group (MGT) in February 2020 to conduct a Classification and Compensation Study. The recommendations provided in this report will assist ██████ with establishing a competitive compensation system in competitive labor markets. ██████ desires to compensate its employees fairly and at rates consistent with their job duties, scope, responsibility, and other appropriate compensable factors to ensure they can recruit and retain the best possible talent.

To accomplish ██████'s project goals, MGT's study included:

- A review of the City's current salary schedule, policies, job descriptions, and benefits data.
- A review of the data gathered through MGT's Management Issues Paper (MIP) survey from ██████ supervisors regarding concerns about job titles, pay, levels, descriptions, recruitment, retainment, and career pathways.
- A review of the data gathered through MGT's Job Content Questionnaire (JCQ) to collect information on each job's essential duties and responsibilities, minimum education and experience requirements, internal and external relationships, physical requirements, and working conditions.
- An evaluation of each job to ensure accurate and industry-standard classifications and titles, FLSA/ADA compliance, and appropriate market benchmarking.
- A review and comparison of salary and benefits data from comparable organizations (as approved by the City).
- The development of an updated classification and compensation system based upon relevant market comparisons, and the assignment of positions to appropriate placement within the proposed system.
- A summary of cost estimates, policies, and strategies to implement the proposed compensation structure.

We appreciate the cooperation of the City's Project Team and all employees and supervisors who assisted in the development of job information for this study.

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## I.2 OVERVIEW OF REMAINING CHAPTERS

This report contains four chapters, including this introduction. The remaining chapters include:

- **Chapter 2.0 – Approach and Methodology**  
This chapter presents a summary of MGT’s methodology for collecting data from employees and for conducting a market analysis for all included classifications. A description of each component is provided.
- **Chapter 3.0 – Results and Reports**  
This chapter provides information on the proposed compensation plan, a summary of the total cost to implement the model, and an overview of the benefits review component of this study.
- **Chapter 4.0 – Administration and Maintenance**  
This chapter presents information about the construction of the compensation system and guidelines for administering and maintaining the system. A list of best practices is included to guide future pay plan management decisions.

Additional information related to this study may be found in the appendices of this report.

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## CHAPTER 2. APPROACH AND METHODOLOGY

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### 2.1 PROJECT ACTIVITIES

MGT prepared the below methodological approach to address the specific issues, concerns, and objectives of the City. Although generally accepted procedures, methodologies, and formats were used to conduct the study and prepare deliverables, the content of all final products was specifically tailored to the circumstances and requirements of the City. The approach used for this engagement consisted of the following primary project activities:

- **TASK 1: CONDUCT INITIAL MEETING AND FINALIZE PROJECT WORK PLAN**  
The objective of this task was to review the technical approach and strategies to be employed, to establish a mutually agreed upon project work plan, schedule, and team responsibilities, and to begin internal data collection.
- **TASK 2: DEVELOP AND IMPLEMENT A COMMUNICATIONS STRATEGY; HOLD ORIENTATION SESSIONS**  
The objective of this task was to understand each team member's roles and responsibilities and to define the project team's communication lines and schedules. Additionally, the MGT project team developed communication materials and conducted orientation presentations as required.
- **TASK 3: REVIEW EXISTING CLASSIFICATION AND COMPENSATION SYSTEM**  
The objective of this task was to work with [REDACTED]'s Project Officer to review the existing compensation plan and related documentation. The MGT team also analyzed job placements in the current system, job descriptions, and existing career ladders and hierarchies, and noted potential issues to be resolved.
- **TASK 4: GATHER AND EVALUATE CURRENT ORGANIZATIONAL AND EMPLOYEE JOB DATA**  
The objective of this task was to gather and evaluate current employee job data by administering the MGT Management Issues Paper (MIP) survey to offer supervisors the opportunity to identify compensation and classification concerns relating to their own areas of responsibility; administering the MGT Job Content Questionnaire (JCQ) to collect relevant job data for analysis; and, reviewing the collected MIP and JCQ survey data to prepare for benchmarking and developing recommendations.
- **TASK 5: IDENTIFY RELEVANT RECRUITMENT MARKET(S)**  
The objective of this task was to identify market salary data sources and to understand and verify the City's recruitment markets and competitor/comparable organizations for benchmarking and wage and salary comparisons.
- **TASK 6: CONDUCT MARKET SALARY AND BENEFITS SURVEY**  
The objective of this task was to benchmark and retrieve data from the selected market data sources for all City positions included in the study. The MGT team also conducted a custom market salary and benefits survey for assessing total compensation and conducting market comparisons.



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➤ **TASK 7: REVISE AND PREPARE JOB DESCRIPTIONS, AS NEEDED**

The objective of this task was to review and examine JCQ job data, MIP notes, and additional information from stakeholders and management concerning positions and to complete recommended updates to job titles, FLSA status, and job descriptions for review and approval by the City. Recommendations also focused on addressing issues related to job family structures and career mobility, as needed.

➤ **TASK 8: DEVELOP COMPENSATION AND CLASSIFICATION SYSTEM; PRESENT REPORT**

The objective of this task was to provide [REDACTED] with an updated classification and compensation system and to provide guidance relative to policies and procedures for the maintenance and administration of the new system. MGT provided [REDACTED] with a study report, detailing methodology, market sources, classification and compensation system recommendations, cost estimates and implementation strategies, and best practices for ongoing maintenance and administration.

➤ **TASK 9: DEVELOP IMPLEMENTATION STRATEGIES**

The objective of this task was to provide [REDACTED] with guidance relative to compensation policy for implementation and with phase-in options. Also provided were cost projections for proposed changes to its classification and compensation system.

➤ **TASK 10: PROVIDE ONGOING ASSISTANCE**

The objective of this task is to provide consultation to [REDACTED] and designated staff on the implementation and maintenance of the proposed system for 12 months following the completion of the study.

The remaining sections of this chapter provide an overview of MGT's key project activities.

## 2.2 PROJECT INITIATION




Upon agreement to proceed, MGT project team held a project kick-off call with [REDACTED]'s Project Officer and key staff on February 12, 2020 to discuss the study's objectives and timeline, and strengths and weaknesses of the current system. Discussions also focused on [REDACTED]'s needs regarding the systems to be developed. The discussions resulted in a view of the City's priorities for classification review, salary administration, and long-range planning. Study announcement and orientation communications materials were provided to [REDACTED] for distribution to employees in lieu of onsite orientation presentations to inform employees about the study. Study Q&A virtual sessions were also offered to employees to address any questions or concerns about the study.



At the start of the study, MGT requested that [REDACTED] provide a database of employee names, position titles, class dates, current salaries, and other pertinent information for analysis. This information served as a directory of the positions to be analyzed. [REDACTED]'s Project Officer also provided MGT with copies of the current salary schedule, job descriptions, and other related policies and data. MGT maintained frequent contact with [REDACTED]'s Project Officer and key personnel throughout the course of the study to ensure that components of the classification and compensation system met [REDACTED]'s needs and goals for compensation.

## 2.3 MARKET DATA SOURCES

One of the key components of a salary study is the market review. Relevant recruitment markets were identified in collaboration with the City’s Project Officer and key staff and used for benchmarking the City’s classifications. The market data sources analyzed in this study are shown in **Exhibit 2-1**.

**EXHIBIT 2-1: MARKET WAGE/SALARY DATA SOURCES**

	<p><b>Salary.com CompAnalyst Database, July 2020</b></p> <p>The following recruitment areas were reviewed for benchmarking classifications:</p> <ul style="list-style-type: none"> <li>• National</li> <li>• Washington Statewide</li> <li>• Seattle (Metro), WA</li> <li>• Bellingham, WA (98225 zip code area)</li> <li>• Bremerton-Silverdale WA</li> <li>• Mount Vernon, WA (98273 zip code area)</li> <li>• Olympia, WA (98501 zip code area)</li> </ul> <p>The CompAnalyst data source was utilized as a primary source for conducting benchmark comparisons in this study’s analyses. Annual average salaries were referenced for the market review. Market data were assessed to include 1) All Industry, All Sizes; 2) All Industry, Revenue Size \$50M-\$200M; and 3) All Industry, Size 25-50FTE. The primary market area used for benchmarking positions to this data source included a regional average of the listed cities and Seattle metropolitan area. The data were controlled for FTE size (25-50 FTE) for this market area to ensure benchmark comparisons for positions were comparable to ██████’s size.</p>
	<p><b>Association of Washington Cities Salary and Benefits Survey, 2019</b></p> <p>The Association of Washington Cities conducts an annual survey of salaries and benefits provided to employees in Washington’s cities and counties. Annual average flat rates for those cities with populations ranging from ~7500 to ~25,000 were referenced for the market review. This market source was used for benchmarking more managerial and highly technical positions to ensure appropriate comparisons to ██████ from peer cities. Data source was provided to MGT by the City.</p>
	<p><b>MGT Consulting Group Custom Market Salary and Benefits Survey, April-May 2020</b></p> <p>As part of MGT’s data collection, the City’s peer and competitor organizations were asked to provide general salary and benefits information for comparisons. An overview of this process is provided in <b>Section 2.4</b>. A copy of the Custom Market Survey is provided in <b>Appendix A</b>, and a copy of the Custom Market Survey Results Summary is provided in <b>Appendix B</b>. Salary data from this survey was used as a market cross-check and not for direct benchmark comparisons.</p>

	<p><b>Washington City Manager Salary Survey, 2019</b></p> <p>The WA City Manager Salary Survey provides salary and total compensation data from 16 cities (populations between 10,000-65,000) for City Managers. The average base salary was used for market comparisons for ██████'s City Manager position. Data source was provided to MGT by the City.</p>
	<p><b>Bureau of Labor Statistics (BLS), Occupational Employment Statistics, May 2019</b></p> <p>The following recruitment areas were selected for benchmarking and comparisons:</p> <ul style="list-style-type: none"> <li>• National</li> <li>• Washington Statewide</li> </ul> <p>████████████████████  ████████████████████  ████████████████████</p> <p>Annual average salaries were referenced for the market review. Overall, the BLS data source was used as a market crosscheck and was not utilized as a source for benchmark comparisons in this study's analyses.</p>

Sources: U.S. Bureau of Labor Statistics website, 2019 data; Salary.com CompAnalyst Database, July 2020 data; AWC 2019 Salary and Benefits Survey data; and MGT Consulting Group Custom Market Salary and Benefits Survey, 2020. Data aged where appropriate.

MGT reviewed the City's classifications to determine the appropriate market benchmarks for comparison based on overall duties and minimum qualifications and to assess the market competitiveness of the classifications' current pay ranges. Generally, market benchmarks in classification and compensation studies reflect the overall market annual average salary of incumbents in a classification. Dependent on market data availability, other market salaries may also be referenced, including the market range minimum, midpoint, and maximum salary rates.

It should be noted that in any market comparison there are no mirror images for an organization, and position benchmarks involve judgement in making comparisons in terms of similar duties, qualifications, and job scope. Through a detailed compilation and comprehensive review of the determined competitive markets, one can establish a general guide to assess market conditions. In reviewing the City's salary structure and positions, a considerable amount of data was generated to select appropriate competitive markets and position benchmarks to conduct comparisons.

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## 2.4 DATA COLLECTION

### MANAGEMENT ISSUES PAPER (MIP)

City supervisors were invited to participate in MGT's online survey, the Management Issues Paper (MIP) (see **Appendix C**), to collect information about specific concerns related to the City's current classification and compensation system. Survey respondents identified concerns or issues with specific positions under their supervisory authority, such as recruitment, retention, salary or pay range, career advancement, and job title. The MIP survey was distributed via email on April 3rd, 2020 and the survey data collection ended on April 13th, 2020. A total of 16 MIP submissions were received by MGT. The results from the MIP survey were provided to [REDACTED]'s Project Officer in a supplemental report.

### JOB CONTENT QUESTIONNAIRE (JCQ)

MGT used a survey instrument called a Job Content Questionnaire (JCQ) (see **Appendix D**) to collect data on City job positions for analysis. All City employees were provided the opportunity to complete a JCQ. The data from the JCQ was used to determine the primary duties of each position, the required minimum education, experience, skills, and training for each position, and to compare jobs to the identified comparable markets. The JCQ collected job data on various factors, including:

- Essential job duties
- Knowledge, skills, and abilities
- Function within the organization
- Education required
- Experience required
- Work performed
- Responsibility and leadership
- Decision-making
- Financial authority
- Physical and dexterity requirements
- Environmental hazards and working conditions
- Sensory requirements

The JCQ was distributed to employees via e-mail on April 7th and was closed on May 11th, 2020.

### CUSTOM MARKET SURVEY

[REDACTED] identified comparison organizations which were invited to participate in MGT's Custom Market Salary and Benefits Survey on April 13th, 2020 to gather data for benchmarking and analyses. Benefits information was collected from organizations for comparisons relative to total compensation (see **Chapter 3.0**).

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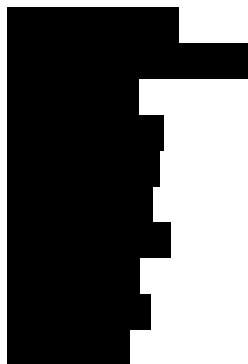
The survey queried comparison organizations about their minimum, midpoint, and maximum salaries and average salaries associated with selected City positions. The benchmark position titles for the survey were based on the following criteria:

- well-known and concisely described
- representative of various functional areas, job categories, and pay levels within an organization
- comprised of common positions that may be readily found among other employers
- identified as hard-to-recruit or highly competitive positions for the City

MGT's custom survey specifically focused on the following classification titles:

1. Maintenance Worker II
2. Maintenance Worker III
3. Maintenance Supervisor
4. Management Analyst
5. Senior Accountant
6. Assistant Planner
7. Senior Engineer
8. Permit Coordinator
9. Surface Water Program Coordinator
10. Intergovernmental Affairs Coordinator
11. Procurement Contract Manager
12. IS Manager
13. Assistant Public Works Director
14. Public Works Director
15. Finance Director
16. City Clerk
17. Development Services Director
18. Assistant to the City Manager

Several e-mail reminders and follow-up calls were made to encourage participation. The survey was closed on May 15th, 2020. Additional data was gathered through online research. Salary and/or benefits data were collected for the following comparable WA organizations:

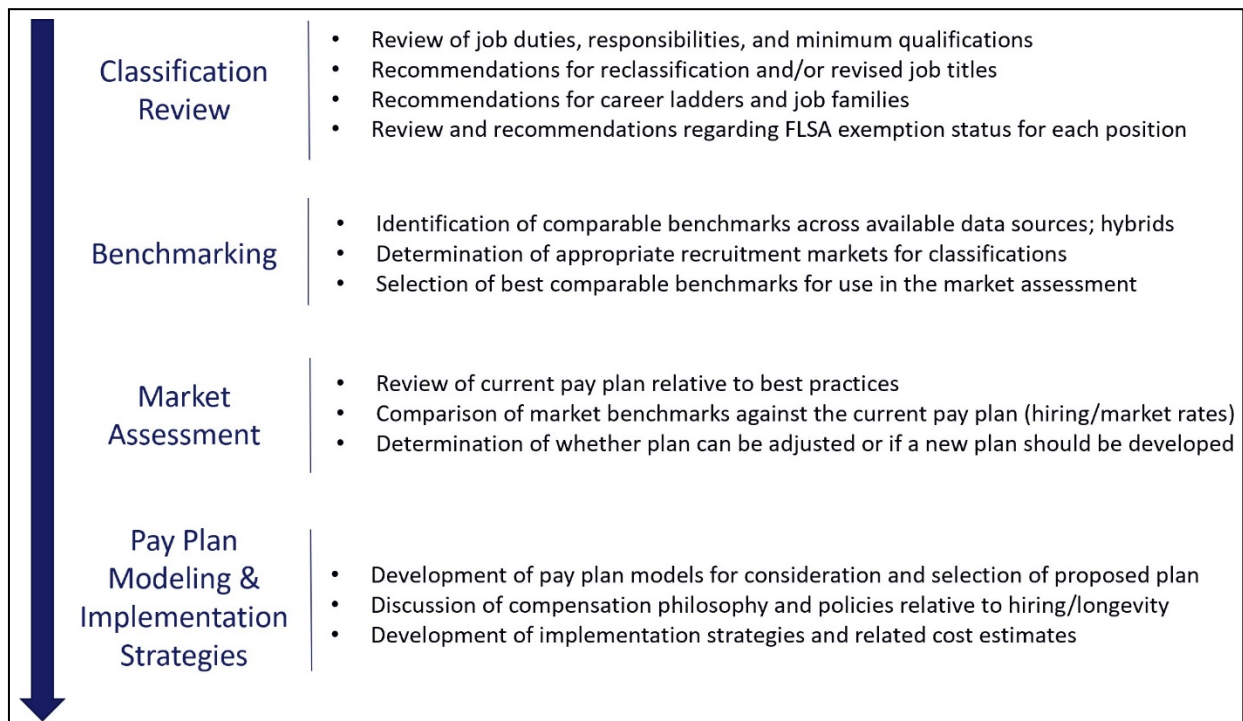


A copy of the survey tool used in this data collection is included in **Appendix A**, and a copy of the Custom Market Survey results is provided in **Appendix B**.

## 2.5 PLAN DEVELOPMENT AND ASSIGNMENTS

**Appendix E** provides a copy of the City’s pre-study pay plan. After collecting the City’s job data and relevant market data, MGT conducted an extensive review of all positions relative to the identified recruitment markets and selected the most appropriate benchmarks based upon data availability and validity. The MIP and JCQ survey data and the data collected during the market review from external data sources were combined and evaluated to determine any needed updates for the City’s positions and compensation system. A database of all benchmark data reviewed during the study were provided to the City’s project team for reference and to support implementation and future maintenance and administration of the proposed system. **Exhibit 2-2** provides an overview of MGT’s process for assessing the City’s positions, assessing market competitiveness, and developing pay plan recommendations.

### EXHIBIT 2-2: OVERVIEW OF REVIEW PROCESSES



Source: MGT Consulting Group, 2020.

The City’s pre-study compensation schedule was assessed for market competitiveness by using the benchmarks’ market salaries to determine if the schedule’s structure was adequate to accommodate adjusting to market rates and allowing room for growth, or if a new system would need to be developed. As a result of this assessment, MGT developed a new pay plan for [REDACTED] to adjust positions appropriately to their respective markets, allow room for career advancement, avoid salary

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compression, and strengthen the City's market competitiveness (see **Chapter 3.0** and **Appendix F** for the proposed pay plan). The City's pre-study pay plan and pay assignments reflected a market minimum policy, in which [REDACTED] is offering the average market rate as a minimum salary for its positions. The proposed pay plan maintains [REDACTED]'s compensation strategy of being competitive in the market by setting the minimum salaries of each pay grade at the market average. [REDACTED] has implemented this strategy considering the high cost of living in the area and the size and scope of services offered by neighboring cities which likely have greater ability to offer higher compensation. In addition to this competitive hiring policy, MGT worked with [REDACTED]'s project team to develop a competitive longevity policy by applying a meaningful percentage to salaries to ensure employees stay market competitive as they progress through the updated pay plan.

Positions were assigned to pay grades per their market benchmarks and were reviewed and adjusted relative to recruiting needs, job family hierarchies, and supervisory lines as necessary. (See **Chapter 3.0** for more details regarding the proposed pay plan and grade assignments.)

## CHAPTER 3. RESULTS AND REPORTS

### 3.1 PROPOSED SCHEDULE AND IMPLEMENTATION

MGT created a new compensation system according to the identified recruitment markets, selected benchmarks, and based upon industry standards and best practices. The minimum salary of each pay grade in the proposed plan represents the market point, or the average market salary, for the positions assigned to the pay range. The proposed competitive pay structure presented in **Exhibit 3-1** (and in **Appendix F**) was created with the following characteristics:

- A 21-grade pay structure for exempt and non-exempt employees.
- Pay grade levels vary by range spreads, as follows:
  - Grades 1-12 (35% total range spread between minimum and maximum)
  - Grades 13-16 (28% total range spread between minimum and maximum))
  - Grades 17-20 (23% total range spread between minimum and maximum))
  - Grade 21 (City Manager’s pay range)\*
- Pay grades are set apart by an average 6.25% - 7.15% spread.

**EXHIBIT 3-1: PROPOSED PAY PLAN**

Grade	Minimum	Maximum
1	\$ 40,540.00	\$ 54,729.00
2	\$ 43,073.75	\$ 58,149.56
3	\$ 45,765.86	\$ 61,783.91
4	\$ 48,626.23	\$ 65,645.40
5	\$ 51,665.36	\$ 69,748.24
6	\$ 54,894.45	\$ 74,107.51
7	\$ 58,325.35	\$ 78,739.23
8	\$ 61,970.69	\$ 83,660.43
9	\$ 65,843.86	\$ 88,889.21
10	\$ 69,959.10	\$ 94,444.78
11	\$ 74,331.54	\$ 100,347.58
12	\$ 78,977.26	\$ 106,619.30
13	\$ 84,625.15	\$ 108,320.19
14	\$ 90,676.93	\$ 116,066.47
15	\$ 97,161.49	\$ 124,366.71
16	\$ 104,109.78	\$ 133,260.52
17	\$ 111,554.96	\$ 137,212.60
18	\$ 119,532.57	\$ 147,025.06
19	\$ 128,080.68	\$ 157,539.23
20	\$ 137,240.08	\$ 168,805.30
CM	\$ 186,624.00	\$ -

Source: MGT Consulting Group, 2020.

Schedule is based on a 40-hour work week.

The City Manager has requested that recommendations concerning compensation for the City Manager position not be implemented at this time.



Each classification (current, vacant, and potential) was assigned to a pay grade within the proposed pay plan per their market benchmarks and were adjusted relative to recruiting needs, job family hierarchies, and supervisory lines as necessary. The proposed base salaries for employees were calculated by utilizing two implementation policies for determining individual employee salaries along their classification’s assigned pay grade range based on market growth and longevity in the position:

1. **Minimum hiring rate policy:** MGT maintained the City’s current compensation policy by setting the proposed pay plan’s minimum salaries at the market. ██████ will have the ability to hire and retain well-qualified staff by offering competitive compensation as well as a competitive benefits package that is comparable to its peer and competitor organizations. Employees with current salaries below the minimum salaries of their proposed grades are recommended to be adjusted up to the minimum salary in the first year of implementation to ensure compliance with the City’s compensation philosophy.
  
2. **Longevity policy:** MGT calculated an implementation longevity policy for moving employees along the pay line between the minimum and maximum salaries of each pay range according to an employee’s length of service with ██████ and satisfactory performance in their position. This service policy moves employees along the pay line at a meaningful rate that rewards employees as they attain greater longevity with the organization. A further breakdown of this policy can be found in **Appendix L**.

MGT encourages the expeditious implementation of the proposed pay plan and policy recommendations proposed in this report as the recommendations are based on the most current competitive market data available. MGT recommends that the following phase-in priorities be established:

1. All employees below the minimum salary of their recommended assigned pay grade should be adjusted to the minimum salary as soon as possible (within 1-year as bestpractice).
  
2. Yearly adjustments (adjustments to proposed base salary per employee longevity) should be completed based upon a set implementation schedule (and as budget allows) to avoid compression, maintain internal equity, and ensure classifications stay competitive with the market.

**Exhibit 3-2** summarizes the estimated fiscal impact of the proposed pay plan implemented with the implementation policies outlined in this report. **The total estimated cost is \$128,323.46 for implementation given employees are moved along the pay line per the longevity policy based on their years of service.**

**EXHIBIT 3-2: TOTAL PAYROLL AND ADJUSTMENT COSTS**

TOTAL PAYROLL OF CURRENT SALARIES	ESTIMATED ADJUSTMENT TO MINIMUM COSTS	ESTIMATED LONGEVITY COSTS	ESTIMATED TOTAL ADJUSTMENT COSTS	ESTIMATED TOTAL PAYROLL OF PROPOSED SALARIES
\$ 3,836,835.00	\$ 38,200.44	\$ 90,123.03	\$ 128,323.46	\$ 3,965,158.46

Source: MGT Consulting Group, 2020. Implementation date of 1/1/2021 was used for calculating market service adjustment costs.

\*The City Manager requested that recommendations concerning compensation for the City Manager position not be implemented at this time. The cost adjustment for including the City Manager position in implementation are included in the above exhibit and cost tables of this report for consideration and planning purposes.

It is recommended that employee salaries be either maintained at their current level or adjusted upward according to the proposed pay structure and policy recommendations provided in this report, and that no employee salaries be reduced, per market adjustment best practices. It should be noted that the cost estimates presented in this report do not take into consideration any additional merit pay or other increases or adjustments made by ██████ per employee (base salaries only). The proposed base salaries are based only on the market salary adjustments for classifications per their assigned pay grades and individual employee longevity. The longevity costs presented are meant to be used as a budgeting tool and would only be recommended if an employee receives a satisfactory performance review. The estimates provided in this report are based on the latest provided employee information (August 2020), and any employee data changes should be accounted for in ██████'s implementation plan prior to taking effect.

In the appendices of this report, MGT has provided several study reports that will assist ██████ with implementing the proposed pay plan and policy recommendations. These reports are as follows:

**Grade Order List Report - Appendix G** indicates the pay grade to which each class title would be assigned under the proposed plan. It further indicates the minimum, midpoint, and maximum pay for each pay grade.

**Outliers Report - Appendix H** contains a list of employees who have a current salary that is either below the minimum of their assigned pay grade, or above the maximum of their assigned pay grade, and the cost estimates for adjustment to minimum.

**Implementation Report - Appendix I** provides implementation cost estimates for the recommended pay structure and grade assignments for each employee in the study. This table reflects the data that were originally provided to MGT in a personnel data request, including names and current salaries.

**Implementation Summary Report - Appendix J** identifies the total fiscal impact of the recommendations by department. The summary report shows payroll figures, the change to payroll with implementation, and the total adjustment amount needed within the department and overall.

**Implementation Strategy Report - Appendix K** provides 1-year, 2-year, and 3-year examples for implementation.

## 3.2 COMPARATIVE BENEFITS AND POLICIES REVIEW

This report section focuses on a comparative assessment of the City's benefits and the value of the overall benefits program in comparison to selected organizations. Benefits data were gathered from the selected organizations through MGT's Custom Market Salary and Benefits Survey. This section also includes a summary of the survey findings regarding specific policies requested by [REDACTED] to be included in the survey and reviewed as part of this study.

### OVERVIEW OF CITY BENEFITS

MGT reviewed [REDACTED]'s benefits information to evaluate the current state of its benefits program in preparation for developing the comparative assessment. [REDACTED] offers its full-time employees a variety of benefits, including:

- ◆ Health Insurance, which includes three plan options:
  - 1) AWC Healthfirst 250 Plan (Regence)
  - 2) Kaiser Permanente
  - 3) High Deductible Health Plan (includes employer contribution to a Health Savings Account)
- ◆ Dental Insurance, in which [REDACTED] covers 88% - 99% of the costs for employees and their families, and offers two plan options to employees:
  - 1) Delta Dental Plan F
  - 2) Willamette Dental
- ◆ Vision Insurance, in which [REDACTED] covers 100% of the costs for employees and their families
- ◆ Life Insurance (\$10,000 of coverage paid by the City with an additional \$100,000 paid by the AWC)
- ◆ Retirement, which includes mandatory participation in the State of Washington Public Employee Retirement System and the option of a 457 Deferred Compensation Plan
- ◆ Paid Leave, which includes:
  - 1) 80 hours per year of vacation leave for service during months 1-12; increases in accruals are based on years of service. Maximum vacation leave accruals is 192 hours per month for service beyond 11 years.
  - 2) 96 hours of sick leave
  - 3) 11 paid holidays, including 1 floating holiday
  - 4) Other leave types, including 3 days of bereavement leave, Exempt Employee, Jury and Witness, Military-Related, and Domestic Violence leave
- ◆ Municipal Employee Benefit Trust, a Social Security In-Lieu Program, in which [REDACTED] and employee each contribute 6.2%<sup>1</sup> of wages to the program

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<sup>1</sup> Contribution rates may vary; 6.2% reflects the current rate at the time of this study.

- ◆ Vehicle stipend for a small number of employees.
- ◆ Employee Assistance Plan, in which [REDACTED] covers 100% of the costs for employees and includes access to such services as financial/legal counseling, onsite trainings, supervisory support, and phone support
- ◆ Additional benefits include auto allowance, mileage reimbursement, and ICMA contributions (City Manager only)

[REDACTED] offers health, dental, and vision coverage at a minimal cost to employees and their families depending on the plan selected. Exhibits 3-3 through 3-7 show the maximum amounts [REDACTED] will contribute towards monthly premiums for medical, dental and vision plans.

**EXHIBIT 3-3: EMPLOYER MEDICAL CONTRIBUTION PER MONTH**

COVERAGE CLASS	EMPLOYER CONTRIBUTION
EMPLOYEE ONLY	\$706.07
EMPLOYEE + SPOUSE	\$1,418.06
EMPLOYEE + SPOUSE + CHILD	\$1,768.81
EMPLOYEE + SPOUSE + 2 OR MORE CHILDREN	\$2,058.77
EMPLOYEE + CHILD	\$1,056.82
EMPLOYEE + 2 OR MORE CHILDREN	\$1,346.79

Source: City of [REDACTED] Employee Benefits, 2020.

**EXHIBIT 3-4: EMPLOYER HIGH-Deductible MEDICAL CONTRIBUTION PER MONTH**

COVERAGE CLASS	TOTAL EMPLOYER CONTRIBUTION
EMPLOYEE ONLY	\$664.89
EMPLOYEE + SPOUSE	\$1,336.21
EMPLOYEE + SPOUSE + CHILD	\$1,669.33
EMPLOYEE + SPOUSE + 2 OR MORE CHILDREN	\$1,943.91
EMPLOYEE + CHILD	\$998.00
EMPLOYEE + 2 OR MORE CHILDREN	\$1,272.56

Source: City of [REDACTED] Employee Benefits, 2020.

**EXHIBIT 3-5: EMPLOYER DENTAL CONTRIBUTION PER MONTH**

COVERAGE CLASS	EMPLOYER CONTRIBUTION
EMPLOYEE ONLY	\$54.72
EMPLOYEE + SPOUSE	\$103.84
EMPLOYEE + SPOUSE + CHILD	\$165.52
EMPLOYEE + SPOUSE + 2 OR MORE CHILDREN	\$165.52
EMPLOYEE + CHILD	\$103.84
EMPLOYEE + 2 OR MORE CHILDREN	\$165.52

Source: City of [REDACTED] Employee Benefits, 2020.

**EXHIBIT 3-6: EMPLOYER VISION CONTRIBUTION PER MONTH**

COVERAGE CLASS	EMPLOYER CONTRIBUTION
EMPLOYEE ONLY	\$9.54
EMPLOYEE + SPOUSE	\$19.06
EMPLOYEE + SPOUSE + CHILD	\$28.58
EMPLOYEE + SPOUSE + 2 OR MORE CHILDREN	\$28.58
EMPLOYEE + CHILD	\$19.06
EMPLOYEE + 2 OR MORE CHILDREN	\$28.58

Source: City of [REDACTED] Employee Benefits, 2020.

All full-time City employees accrue vacation leave as shown in **Exhibit 3-7**.

**EXHIBIT 3-7: EMPLOYEE VACATION LEAVE ACCRUAL RATES**

LENGTH OF SERVICE	HOURS OF LEAVE PER CALENDAR MONTH OF SERVICE	ANNUAL LEAVE IN HOURS PER YEAR OF SERVICE
0-12 <sup>TH</sup> MONTH	6.67 hours	80.04 hours
13 <sup>TH</sup> - 48 <sup>TH</sup> MONTH	8.67 hours	104.04 hours
49 <sup>TH</sup> – 84 <sup>TH</sup> MONTH	10 hours	120 hours
85 <sup>TH</sup> – 132 <sup>ND</sup> MONTH	12 hours	144 hours
133 <sup>RD</sup> + MONTHS	16 hours	192 hours

Source: City of [REDACTED] Employee Benefits, 2020.

## BENEFITS COMPARATIVE ANALYSES

As part of MGT’s data collection, selected organizations were asked to provide the overall average value of their benefits package as a percentage of total compensation offered to its employees (as shown in **Exhibit 3-8**). One of the primary indicators of market competitiveness is the value of an organization’s benefits package relative to total compensation.

**EXHIBIT 3-8: OVERALL AVERAGE BENEFIT VALUE AS A PERCENTAGE OF TOTAL COMPENSATION**

ORGANIZATION	BENEFITS PERCENTAGE OF TOTAL COMPENSATION
CITY OF ██████████	<b>33.34%</b>
<b>PEER AVERAGE</b>	<b>33.27%</b>
CITY OF LYNNWOOD	37.00%
CITY OF KENMORE	35.00%
CITY OF ISSAQUAH	31.83%
CITY OF KIRKLAND	30.00%
CITY OF MONROE	30.00 – 35.00% (32.50 average)

Source: MGT Custom Market Salary and Benefits Survey, 2020.

The responding organizations reported an average benefits package value of 33.27 percent compared to the City’s at 33.34 percent, a difference of 0.07 percent. Overall, ██████████ offers a benefits package that is comparable to the benefits values of the surveyed organizations at the time of this study.

**Exhibit 3-9** shows the percentage contributions made by the employer and employee as a percentage of the total cost of employee health and welfare benefits for ██████████ and the responding organizations. ██████████ offers health insurance to part-time employees on a pro-rated basis. As seen below, ██████████ contributes slightly more than its peers.

**EXHIBIT 3-9: PERCENTAGE SPLIT BETWEEN EMPLOYER AND EMPLOYEE FOR HEALTH BENEFITS**

ORGANIZATION	EMPLOYEE CONTRIBUTION	EMPLOYER CONTRIBUTION
CITY OF ██████████	<b>7.0%</b>	<b>93.0%</b>
<b>PEER AVERAGE</b>	<b>7.4%</b>	<b>92.6%</b>
CITY OF LYNNWOOD	10.0%	90.0%
CITY OF LAKE FOREST PARK	10.0%	90.0%
CITY OF KENMORE	10.0%	90.0%
CITY OF KIRKLAND	0.0%	100.0%
CITY OF MONROE	7.0%	93.0%

Source: MGT Custom Market Salary and Benefits Survey, 2020.

The surveyed organizations were asked whether health insurance is offered to their part-time employees, and if so, how the insurance premium paid is determined. As shown in **Exhibit 3-10**, [REDACTED] offers health insurance to part-time employees on a pro-rated basis.

**EXHIBIT 3-10: PART-TIME EMPLOYEE INSURANCE OFFERED**

ORGANIZATION	PART-TIME EMPLOYEE HEALTH INSURANCE PROVIDED?	HOW THE PERCENTAGE OF THE PREMIUM PAID IS DETERMINED BY THE ORGANIZATION
CITY OF [REDACTED]*	YES	At a pro-rated basis
CITY OF LYNNWOOD	YES	No response
CITY OF LAKE FOREST PARK	YES	20 hours per week or more; may cover employee only
CITY OF KENMORE	YES	Pro-rated based on percentage of FTE
CITY OF KIRKLAND	YES	Employee pays a percentage of the employer pay
CITY OF MONROE	NO	N/A

Source: MGT Custom Market Salary and Benefits Survey, 2020.

\*[REDACTED] provides no-cost flu immunization for part-time employees who work at least 20 hours per week.

**Exhibit 3-11** shows whether dental insurance is offered as a voluntary or contributory benefit by the surveyed organizations, and if contributory, what the percentage of the premium is paid by the employer.

**EXHIBIT 3-11: DENTAL INSURANCE COMPARISON**

ORGANIZATION	DENTAL INSURANCE PROVISION TYPE	PERCENTAGE OF PREMIUM PAID BY EMPLOYER
CITY OF [REDACTED]	CONTRIBUTORY	94%
PEER AVERAGE	N/A	100%
CITY OF LYNNWOOD	CONTRIBUTORY	100%
CITY OF LAKE FOREST PARK	VOLUNTARY	-
CITY KENMORE	CONTRIBUTORY	100%
CITY OF KIRKLAND	VOLUNTARY	-
CITY OF MONROE	CONTRIBUTORY	100%

Source: MGT Custom Market Salary and Benefits Survey, 2020.

Exhibit 3-12 shows whether vision insurance is offered as a voluntary or contributory benefit by the surveyed organizations, and if contributory, how much of the premium is paid by the employer.

**EXHIBIT 3-12: VISION INSURANCE COMPARISON**

ORGANIZATION	VISION INSURANCE PROVISION TYPE	PERCENTAGE OF PREMIUM PAID BY EMPLOYER
CITY OF ██████████	CONTRIBUTORY	100%
<b>PEER AVERAGE</b>	-	<b>100%</b>
CITY OF LYNNWOOD	CONTRIBUTORY	100%
CITY LAKE FOREST PARK	VOLUNTARY	-
CITY KENMORE	CONTRIBUTORY	100%
CITY OF KIRKLAND	VOLUNTARY	-
CITY OF MONROE	CONTRIBUTORY	100%

Source: MGT Custom Market Salary and Benefits Survey, 2020.

Exhibit 3-13 provides an overview of whether the surveyed organizations’ retirement benefit is mandatory, the types of retirement plans offered, and the percentage matched by the employers for the plan. ██████████ and all responding organizations indicated that a defined and benefit contribution plan is offered to employees, with only one organization in which participation is not mandatory.

**EXHIBIT 3-13: RETIREMENT PLAN COMPARISON**

ORGANIZATION	MANDATORY?	RETIREMENT PLANS OFFERED	EMPLOYER MATCH PERCENT
CITY OF ██████████	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%
<b>PEER AVERAGE</b>	-	-	<b>12.86%</b>
CITY OF LYNNWOOD	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%
CITY OF LAKE FOREST PARK	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%
CITY OF KENMORE	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%
CITY OF KIRKLAND	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%
CITY OF MONROE	YES	DEFINED BENEFIT AND CONTRIBUTION PLAN	12.86%

Source: MGT Custom Market Salary and Benefits Survey, 2020.



██████████ and all responding organizations offer sick, vacation, and holiday leave to their employees. The maximum number of hours offered for annual paid leave by each organization and each leave type are displayed in **Exhibit 3-14**. Overall, ██████████ offers comparable leave hours to the responding organizations' peer average except for vacation leave, in which ██████████ offers 192 hours of vacation leave and the peer average is 205 hours of vacation leave.

**EXHIBIT 3-14: MAXIMUM NUMBER OF ANNUAL PAID LEAVE HOURS**

ORGANIZATION	SICK	VACATION	HOLIDAY	TOTALS
CITY OF ██████████	96	192	88	= 376
PEER AVERAGE	96	205	89	= 390
CITY OF LYNNWOOD	96	200	96	= 392
CITY OF LAKE FOREST PARK	96	184	80	= 360
CITY OF SEATTLE	96	240	88	= 424
CITY OF KENMORE**	96	200	80	= 376
CITY OF KIRKLAND***	96	200	88	= 384
CITY OF MONROE	96	208	104	= 408

Source: MGT Custom Market Salary and Benefits Survey, 2020.

Note: ██████████ and the responding organizations offer additional leave types, including common leave days for bereavement and jury/witness duty.

Note: The City Manager may grant up to 40 hours per year of paid Exempt Employee leave to each exempt employee based upon extraordinary time, effort, and commitment of the employee in the performance of their job as determined at the discretion of the City Manager.

\*The cities of ██████████ and Monroe do not have personal leave hours offered to employees. All other organizations offer 8 hours of personal leave except for the City of Lake Forest Park, which offers 16 hours.

\*\*The City of Kenmore offers 80 hours of Executive leave.

\*\*\*The City of Kirkland offers 8 hours of community service leave.

Exhibit 3-15 shows the additional type of benefits offered by [REDACTED] and the responding organizations.

**EXHIBIT 3-15: ADDITIONAL BENEFITS OFFERED TO EMPLOYEES**

ORGANIZATION	LIFE INSURANCE	LONG-TERM DISABILITY	SHORT-TERM DISABILITY	HOSPITAL / ACCIDENT / CANCER	REIMBURMENT ACCOUNTS	SICK LEAVE DONATION OR BUY BACK	TUITION REIMBURSEMENT PROGRAM	VEHICLE ALLOWANCE	CELL ALLOWANCE
CITY OF [REDACTED]	X	X						X	
CITY OF LYNNWOOD	X	X	X	X	X	X	X		
CITY OF LAKE FOREST PARK	X	X			X		X		
CITY OF KENMORE	X	X				X	X	X- CITY MGR. ONLY	X
CITY OF ISSAQUAH	X	X			X	X	X		
CITY OF KIRKLAND	X	X					X		
CITY OF REDMOND	X	X	X						
CITY OF MONROE	X					X			
CITY OF DUVALL	X	X				X	X	X	

Source: MGT Custom Market Salary and Benefits Survey, 2020.

## POLICIES COMPARATIVE SUMMARY

In addition to collecting data regarding salary and benefits from the surveyed organizations and per ██████'s request, the survey also queried organizations about two specific policies relating to the administration of the peers' compensation systems and pay practices.

The surveyed organizations were asked what they do to effectively attract and retain quality employees while providing current employees with opportunities for career growth. A summary of their responses is outlined in **Exhibit 3-16**.

### EXHIBIT 3-16: MEANS OF RECRUITMENT, RETENTION, AND PROVIDING EMPLOYEES OPPORTUNITIES

ORGANIZATION	RESPONSE
CITY OF LYNNWOOD	<ul style="list-style-type: none"> <li>• Provide competitive salaries.</li> <li>• Provide training opportunities, including tuition reimbursement.</li> <li>• Promote from within when feasible.</li> </ul>
CITY OF LAKE FOREST PARK	<ul style="list-style-type: none"> <li>• Competitive salary and benefits package.</li> <li>• Non-union salaries are compared to similar cities (size, assessed valuation, population) every 4-5 years and are adjusted as necessary.</li> </ul>
CITY OF KENMORE	<ul style="list-style-type: none"> <li>• Varied, interesting, and challenging work experience.</li> <li>• Tuition reimbursement program.</li> <li>• Generous training budgets.</li> <li>• Supportive City management and Council.</li> <li>• Competitive salaries and benefits.</li> </ul>
CITY OF KIRKLAND	<ul style="list-style-type: none"> <li>• Decent training budget and we are small enough to be very integrated with our work, but large enough to be able to work regionally at a high level. This provides more opportunities for our employees to interact with the public and other cities on projects.</li> </ul>
CITY OF MONROE	<ul style="list-style-type: none"> <li>• Recruitment is conducted on a wide scale. Focus for recruitment is based on organizational fit.</li> <li>• To retain employees the City focuses on team building, autonomy, and sense of purpose within the organization.</li> <li>• Opportunities are provided for career growth through training, mentorship, and understanding what skill sets are necessary for career growth in the employees' chosen career.</li> <li>• Offering and maintaining a competitive salary and benefit scale that is frequently reviewed.</li> </ul>

Source: MGT Custom Market Salary and Benefits Survey, 2020.

**Exhibit 3-17** provides a summary of the peer responses regarding organizational policy adopted to address employees with long tenures or those employees that reach the top of their pay range.

**EXHIBIT 3-17: POLICY REGARDING EMPLOYEES WITH LONG TENURE OR AT TOP OF PAY RANGE**

ORGANIZATION	RESPONSE
CITY OF LYNNWOOD	<ul style="list-style-type: none"> <li>• Provide longevity pay.</li> </ul>
CITY OF LAKE FOREST PARK	<ul style="list-style-type: none"> <li>• None.</li> </ul>
CITY OF KENMORE	<ul style="list-style-type: none"> <li>• They only receive annual cost of living adjustments.</li> </ul>
CITY OF KIRKLAND	<ul style="list-style-type: none"> <li>• Our unions have longevity benefits so that long-term employees receive extra pay each month for their years of service. Our vacation balances also reflect a high level of reward for years of service.</li> </ul>
CITY OF MONROE	<ul style="list-style-type: none"> <li>• Salaries of tenure employees are reviewed on a yearly basis for cost of living increases. Longevity pay is also offered for employees that are part of a collective bargaining agreement.</li> </ul>

Source: MGT Custom Market Salary and Benefits Survey, 2020.

## CHAPTER 4. ADMINISTRATION AND MAINTENANCE

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Compensation systems should be evaluated annually to address market competitiveness of current salaries and pay grades, as well as to adjust individual employee salaries and pay grades appropriately. Pay schedule maintenance and related salary adjustments should be guided by market changes and be applied consistently throughout the compensation system, adjusting all salary grades.

MGT recommends that salary and compensation strategies of all organizations include provisions for both internal equity and external competitiveness. Internal equity, or the comparison of positions within an organization to ensure fair pay, is essential for both the maintenance of a sense of fairness and the morale of current employees. External competitiveness, or when the pay that workers in one organization receive is like that of other workers doing a similar job in other organizations, through annual salary and compensation improvements is essential for the organization to be able to retain current staff and recruit the most qualified new hires available. Both current employees and potential new hire recruits should be made aware of the salary, insurance benefits, paid leave provisions, and other benefits offered that constitute each employee's total compensation package. In addition, a systematic process for initial placement and advancement through salary increases in a classification's assigned pay grade according to established salary and compensation policies and procedures should be implemented and consistently maintained.

This chapter identifies standard best practices in salary administration and maintenance.

### 4.1 IMPLEMENTATION STRATEGIES

#### Plan Implementation

The financial disposition, current salary levels, and other variables unique to an organization must be considered when implementing adjustments to salary structures. These factors, among others, should be reviewed in conjunction with the recommendations proposed in this report before any final implementation plan is considered and set into motion.

Pay schedules must provide for employee advancement through salary increases. Regardless of an organization's philosophy concerning advancement opportunities by way of promotions afforded to employees, it is essential that movements in the economy — and, more specifically, the labor market in which the organization competes — are addressed through salary increases and that career ladders are developed (i.e., the progression from entry-level positions to higher levels of pay, skill, responsibility, and/or authority). Salary administration procedures should be based upon organization funding levels and philosophies of pay. Although MGT cannot dictate a philosophy, it is recommended that a balance be achieved between compensation of individual employees and potential compensation to encourage recruitment and retention.

### Initial Assignments

When employees are initially assigned to their new salary plan and grade/step assignment, they should be assigned to a salary dollar amount on the new schedule that is equal to or greater than their current salary as market and longevity in their position dictate. The following guidelines may be used for determining employee salary:

- For employees whose current salary is below the minimum of their assigned pay grade, the recommended salary level would be the minimum of the pay grade, adjusting for level of service once brought to the minimum.
- If an employee's present salary level exceeds the maximum of the new assigned pay grade, the current salary should be frozen at the current level, unless organizational policy dictates otherwise. The employee would be ineligible for any base salary increases until the pay grade range is adjusted or expanded to allow for movement.
- All other employees should be assigned a salary amount in their pay range as appropriate relative to the organization's longevity policy. Employees assigned to a pay plan that did not receive a recommendation for a market adjustment will maintain their present salary amounts. Employees assigned to a pay plan that received a recommendation for a market adjustment should be adjusted to the increased salary amount as appropriate.

## 4.2 STANDARD SALARY MAINTENANCE PRACTICES

### New Hires and Hiring at or Above Minimum Rate

Best practices recommend that employers hire new employees at the minimum of their assigned pay grade range. The pay grade and salary allocated to a classification should consider the necessary experience and qualifications to perform the position's duties. Exceptions to the minimum rule may be made if the individual's years of experience or qualifications/certifications exceed the minimum required, and/or if there is difficulty in recruiting qualified candidates. It is not unusual for organizations to hire candidates at or over the market rate in order to fill highly competitive positions; many organizations set a hiring range for this purpose. Extraordinary hiring criteria or circumstances may include the following:

- If the applicant, when hired, will contribute to the work of the organization significantly beyond what other applicants for the position would contribute, such as offering advanced skill or knowledge from certifications or trainings, or from network connections that may bolster the organization.
- If the applicant exhibits extraordinary qualifications that provide expertise in a particular area desired by the organization. This expertise significantly exceeds the normal requirements of similar classes in the pay grade.
- If there is documented recruitment difficulty in filling the position over a longer than normal recruitment period.

In addition to the candidate's qualifications and competitiveness of the recruitment market, other factors that should be considered relative to determining an appropriate starting salary include comparable internal salaries and/or positions (internal equity), the turnover history of the classification, and the salary expectations of the potential employee. Salary assignments should be determined according to established rules for both initial placement of new hires and for the annual review and/or advancement through promotions of current employees. For example, organizations may set a 5% or 10% increase to the hiring rate to acknowledge a new hire's degree level or additional years of experience over the minimum qualifications. The supervisor or department head must submit written justification to Human Resources for making the recommendation to hire at a higher salary amount than the pay grade's minimum rate.

All new hires should meet the minimum qualifications listed for their classification. If there is difficulty with recruiting or identifying suitable qualified candidates for a position, an acting, temporary, or interim assignment for the best qualified current employee available may be utilized. The department head must submit written justification to Human Resources for making this recommendation, and the salary assignment should be adjusted accordingly.

### **Salary Advancement**

Salary advancement within a pay grade is commonly based upon longevity and/or merit. Merit pay rewards an employee's performance while longevity pay can reward an employee's length of service. A merit policy and related salary advancement is determined by annual performance evaluations. If an employee achieves a "satisfactory" or higher rating, the employee should be considered for a salary increase or bonus based upon approved standards. Salary advancement should be considered at least on an annual basis in alignment with an employee's performance evaluation and follow established Human Resources' policies and procedures. Longevity pay is a useful tool for encouraging retention at an organization. Salary advancement according to an organization's longevity policy can be implemented regardless of an employee's performance evaluation rating. Specific to the City's compensation strategy, [REDACTED]'s longevity policy for moving employees along the pay line between the minimum and maximum salaries of each pay range would be based on an employee's length of service and satisfactory performance in their position.

### **Promotion**

A promotion is defined as an assignment to a higher-level position with increased responsibilities and job duties for which the candidate is qualified. All job vacancies should be posted according to approved policies and procedures, and the most qualified candidates should be selected. Promotions may be either inter- or intra-departmental, within a job family, or to a position outside the employee's current career ladder. Commonly, if an employee's salary does not increase by at least 5 percent with the new responsibilities, the employee's move to the new position would be considered a reassignment or transfer instead of a promotion (also see **Reassignments / Transfers**). Promotions must be approved by the affected department head(s) and Human Resources, and in every case should involve an increase in duties and responsibilities and should not be made merely for affecting an increase in compensation.

A promoted employee should receive a salary increase to at least the minimum rate of the salary grade of the promoted position. If the employee's salary is above the minimum established for the pay grade to which the employee was promoted, the salary may be increased to the salary level for that pay grade according to the employee's longevity and performance per current organizational policies, and should not

be equal to or lower than the employee's current salary. Salary determinations should also take into consideration market conditions for the given classification as well as budget constraints.

### **Demotion**

A demotion is the assignment of an employee to a position in a lower classification, with a lower maximum salary, than the classification from which the employee was previously assigned. Demotion is normally due to the removal of higher-level duties and responsibilities, organizational restructuring, or the inability of the employee to assume or perform duties of the position. A supervisor may recommend the demotion of an employee. Approval to demote an employee should be dictated by personnel rules, and the recommendation for a demotion should be made in writing, citing the reasons.

The following guidelines may be referenced for determining salary for demoted employees:

- If an employee's salary is above the maximum established for the pay grade being entered, the salary may be decreased to, at most, the maximum of the new position.
- Since a demotion involves a decrease in duties and responsibilities, if the existing salary is below the maximum of the lower classification, a decreased salary of at least five percent, per best practice, below the current salary is appropriate and necessary to fulfill the cause for the demotion.
- Employees receiving demotions at their own request or due to inability to perform the work because of health or other reasons should be adjusted to a lower job classification, if possible. When a demotion of this nature occurs, the employee's pay should be reduced.
- In no case should a demoted employee's salary exceed the maximum rate of the lower paygrade.

### **Supplemental Pay**

Supplemental pay is usually given to employees who hold certifications not required for their position, for undesirable work hours or shifts, as hazard pay, or when employees are assigned duties that demand a considerable number of hours outside their normal duties. Supplemental pay may be given in cases of temporary work assignments or for additional duties that do not fall under another classification and that significantly increase the employee's workload by 50% on average, per industry standards.

Supplemental pay is often given to employees who are assigned to special projects or in which the responsibilities and duties of a position expand but do not alter the minimum qualifications or nature of the position's work, in which case would merit a review for possible reclassification, such as in instances in which the additional duties are not short-term or temporary. Supplemental pay rates vary across organizations and are typically tailored to an organization's specific needs and financial flexibility. The method of supplemental pay chosen by an organization should take into consideration the number of employees eligible for supplemental pay and available funding for the supplemental pay program.

Typically, supplemental pay schedule(s) adopt one of the following methods:

- Flat rate for the specific assigned task(s) or certification(s) (determined by the organization)
- Percentage of employee's base or actual salary



A flat rate method for determining supplemental pay often is preferable to using the percentage of an employee's base or actual salary as it allows for more labor cost control and easier budget planning and projecting. In addition to budget considerations, organizations also design their supplemental pay policy based on the market competitiveness of the classification(s) in question and/or the necessity or value of the certification(s) to the organization.

Supplemental pay is generally issued for the duration of the additional assignment or for the life of the certificate held by certified employees. Some organizations design their flat-rate supplemental pay systems into grades to provide supplemental pay based on an employee's years of service. Any supplemental pay policy and/or schedule should be reviewed and approved on an annual basis.

### **Hazard Pay**

Hazard pay is provided to employees in addition to their base pay for being assigned to positions or locations that are deemed hazardous. Hazard pay may be permanent or temporary depending on the nature or duration of the hazard. According to the Society for Human Resources Management (SHRM), employees typically receive hazard pay based on either the employee's position or location depending on which offers the greater monetary benefit, but not for both. SHRM also recommends that hazard pay for position be based on an employee's years of service, providing increases for employees with higher years of service, and that hazard pay for location be based on a pay differential of 25 percent of an employee's base salary, as established by the U.S. Department of the State. According to the Internal Revenue Service, hazard pay is considered taxable income and is to be included on the employee's W-2 form.

### **Reassignments / Transfers**

A reassignment or transfer is the non-competitive movement of an employee from their current position to another position within an organization for non-disciplinary reasons without demotion or promotion. Reassignments can be voluntary or involuntary (initiated by the employee versus by the organization or department).

- Voluntary reassignment, or transfer, involves moving an employee laterally from their current position to a position at the same classification level in either the same or another department. An employee may request a transfer to another position for a variety of reasons, such as to enter a different career ladder, join a different department or area of focus, or to pursue a new work-life balance (e.g. transferring to a position requiring less travel).
  - Employees voluntarily reassigned to a position in the same pay grade should have their salaries maintained at the current level with no increase or decrease.
  - Employees voluntarily reassigned to a position in a different pay grade should either maintain their current salary or be adjusted to the salary rate in the new position's grade that follows organizational policy for moving employees along their position's respective pay grade per longevity and merit policies.

An employee may submit a written request for consideration for a voluntary reassignment to another department or position in the organization for which they are qualified if a position is vacant or there is a need. Final approval should be obtained from the department head and Human Resources, according to established policies and procedures.

- **Involuntary reassignment** refers to a reassignment initiated by an agency against an employee's will and without the employee's consent for reasons other than for causes of misconduct, delinquency, or inefficiency. There are a variety of reasons for involuntary reassignments that include, but are not limited to, the good of the employee, the best interests of the organization, and/or other defensible actions based on the judgment of its leaders.
  - An involuntary reassignment for the good of the employee might involve an individual who is no longer physically capable of performing their duties and requires a reasonable accommodation, such as reassigning the employee to a less strenuous position.
  - An involuntary reassignment serving the best interest of the employer are normally initiated by the employer rather than the individual, such as filling urgent vacancies or assigning an employee with desired skills to another position or department where the employee is needed. Reassignments that serve the best interest of the employer can be permanent, but they can also be temporary to address a short-term challenge, in which an “interim” or “acting” status may be applied to the position held by the employee.

Involuntary reassignments in which the employee is reassigned to a position in the same pay grade should have their salaries maintained at the current level with no increase or decrease. If the employee is reassigned to a position in a different pay grade, the employee’s salary should be adjusted according to the position’s pay grade range and be adjusted per the organization’s longevity and merit policies.

#### **Reassignments Under Reduction-in-Force**

Employers often allow reassignments after initiating a reduction-in-force, in which employees are offered reassignment to a different vacant position instead of being laid off or furloughed.

Reassignments in which the employee is reassigned to a position in the same pay grade should have their salaries maintained at the current level with no increase or decrease. If the employee is reassigned to a position in which the position is in a different pay grade, the employee’s salary should be adjusted according to the given position’s pay grade and organizational policy.

#### **Classification Creation and Reclassification**

Organizations treat the development of new classifications and reclassifications in several ways. Classification creation or reclassification can take place when the work performed changes substantially over time, when new technology is introduced, or the mission of an organizational unit is modified in response to changing legislation or changing service demands. The need for a new or revised classification can also occur when organizational demands or job duties change through design or evolution.

Classification creation and reclassifications are generally initiated through the Office of Human Resources but may also be initiated at the request of an individual or their supervisor. If an individual or supervisor initiates a request for creation or reclassification, it is usually accompanied by written supporting documentation. Reclassification should also consider other positions within the overall classification system and should not be determined independently of these positions and without consideration to the department and organizational hierarchy.

When a reclassification or new classification request is received or initiated by the Office of Human Resources, a Job Content Questionnaire (JCQ), or other authorized survey document to understand an employees' job duties and requirements, should be completed by the supervisor and/or all incumbents holding the same job title, as applicable. Key questions concerning the job should be answered to assist in determining the proper level within the overall pay and classification system. For reclassifications, the position audit results should be compared to the current position description for the various classification levels to determine the correct classification assignment.

If it is determined that a creation or reclassification is justified, the Office of Human Resources should approve and authorize the change. Current employees in reclassified positions should either maintain their current salary or be adjusted to a salary in the assigned pay grade for the reclassified position per organizational policy. Reclassification is not considered the same as a demotion, and therefore, an employee's salary should either be maintained at its present level or increased according to the reclassified position's pay grade and organizational policy for moving employees along the pay line of their pay grade. If the reclassified position's pay grade indicates a lower salary, the current employee's salary should be maintained and adjusted over time per organizational policy and not be reduced due to reclassification. This may mean that the employee's salary is temporarily frozen at its present level until movement in the assigned pay grade is allowed per an organization's longevity and merit policies.

#### **Administration and Maintenance of the Plan**

Salary systems should be adjusted annually, or at least biennially if annually is not feasible, based on the Consumer Price Index (CPI) and appropriate market data sources to maintain market competitiveness and adjust for inflation and changing recruitment markets. The guidelines outlined in this chapter may be utilized for salary maintenance and administration of the proposed salary schedule. These guidelines should be applied according to base pay salary, not including additional pay received as bonuses, supplements, or pay for additional assignments. In all cases in which a computed salary is greater than the top pay within the new pay grade, the salary may be frozen at the maximum salary until subsequent adjustments are made to the salary schedule that would allow increases, or as dictated by internal policy regarding employees who reach the maximum of their assigned pay grades.

APPENDIX A:

CUSTOM MARKET SURVEY - COPY

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# City of ██████████, WA Market Salary & Benefits Survey

The City of ██████████ (WA) has contracted with MGT Consulting Group to review its compensation system and related policies to ensure best practices and market competitiveness.

We ask that you respond to a brief survey that is designed to collect general salary, benefits, and pay policy information to assist MGT in the evaluation of the City's compensation.

**Please complete this survey by 5:00 p.m. on  
Wednesday, May 13th.**

Thank you for your participation in this important study.

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**In appreciation of your participation, a copy of the survey results can be sent to you upon request.**

- Yes, I would like a copy of the survey results.
- No, I do not want a copy of the survey results.

---

## **DECLINING PARTICIPATION**

If you decide to decline to participate in this survey after reviewing the questions, please return to this page and select the option below to decline participation.

Once the option below is selected, please click NEXT to submit your response.  
**You will not be able to return to this survey after submitting this option.**

- I would like to decline participating in this survey.

---

**MGT Consulting Group**  
4320 W. Kennedy Blvd., Suite 200 | Tampa, Florida 33609  
Phone (888) 302-0899, Fax (850) 385-4501  
[www.MGTConsulting.com](http://www.MGTConsulting.com)

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**PLEASE NOTE:**

Your entries will be saved after you advance through each page. You can revisit your responses as many times as you feel necessary prior to final submission.

DO NOT work on your survey in multiple browser tabs. Survey responses are recorded in real-time as you click the "Next" and "Back" buttons in the survey; working from more than one browser tab containing your survey link may result in the loss of data you have entered.

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If you have any technical questions or issues with this survey, please contact:  
**REDACTED, Consultant,** [REDACTED@mgtconsulting.com](mailto:REDACTED@mgtconsulting.com), or  
**REDACTED, Analyst,** [REDACTED@mgtconsulting.com](mailto:REDACTED@mgtconsulting.com).

---

Your Organization's Name

---

**I. BENEFITS**

What percentage of an employee's total compensation is the benefits package (on average)?

Please select all of the benefits offered by your organization. (Choose all that apply.)

- Health (general coverage)
- Dental
- Vision
- Life
- Hospital
- Accident
- Cancer
- Short-term Disability
- Long-term Disability
- Reimbursement Accounts
- Sick Leave Donation or Buy Back
- Retirement Plans
- Moving Expenses Program
- Tuition Reimbursement Program
- Vehicle/Allowance
- Cell/Allowance
- Other 1 (please indicate):
- Other 2 (please indicate):
- Other 3 (please indicate):

---

**HEALTH INSURANCE:**

Please indicate the average monthly dollar amounts paid by a full-time employee and the

**organization for each specific health plan (as applicable).**

	Average Monthly Dollar Amount Paid By Employee	Average Monthly Dollar Amount Paid By Organization
Employee Only	<input type="text"/>	<input type="text"/>
Employee + Child	<input type="text"/>	<input type="text"/>
Employee + Children	<input type="text"/>	<input type="text"/>
Employee + Spouse	<input type="text"/>	<input type="text"/>
Employee + Family	<input type="text"/>	<input type="text"/>

**What is the percentage split between employer and employee for health benefits?**

	Employer (%)	Employee (%)
% Contribution	<input type="text"/>	<input type="text"/>

**Does your organization offer health insurance to part-time employees?**

- Yes (How does your organization determine the percentage of the premium paid?):
- No



**DENTAL INSURANCE:**

Is dental insurance a voluntary or contributory benefit?

- Voluntary
  - Contributory (What percentage of the premium is paid by the employer?):
- 

**VISION INSURANCE:**

Is vision insurance a voluntary or contributory benefit?

- Voluntary
  - Contributory (What percentage of the premium is paid by the employer?):
- 

**RETIREMENT:**

Select all retirement plans offered by your organization. *(Check all that apply.)*

- Defined Benefits Plan Only (i.e., pension)
  - Defined Contribution Plan Only (e.g., 457, 401(k) plan)
  - Both a Defined Benefit and Defined Contribution Plan
  - Retirement plan options not offered
  - Other (Please indicate):
- 

What percentage is the employer match? (if applicable)

Is the retirement plan mandatory?

- Yes
  - No
-

Please enter the maximum number of paid hours offered annually to full-time employees for each type of leave listed below.

Sick:

Vacation:

Holiday:

Personal:

Other (please indicate):

---

Total:

---

## II. SALARY

What does your organization do to effectively attract and retain quality employees, while also providing current employees with opportunities for career growth?

What is your organization's compensation policy regarding employees with long tenures, or those employees that reach the top of their pay range?

Please upload a copy of your current salary schedule(s) (with classification grade assignments, if available). Include the date on which the salary schedule was last updated.

**Please enter salary data for the list of classification titles in the table below.**

**Please read the following definitions before continuing.**

**Match Title:** The corresponding classification title in your organization.

**Headcount:** The number of employees in each comparable class in your organization.

**Years in Class (Avg):** The number of years the incumbent has spent in the given class, or incumbent average.

**Years in Class Range:** The highest and lowest number of years for incumbents in the given classification, if more than one incumbent. Example: 4-13. Enter N/A if single incumbent.

**Minimum, Midpoint, and Maximum of Salary Ranges:** The minimum, midpoint, and maximum salaries for the salary ranges associated with each classification.

**Average Salary:** The actual average annual salary of incumbents occupying each classification. This is calculated as the sum of all salary outlays to incumbents in the class divided by the total number of incumbents in that class. This should also be calculated and based on 12-month appointments (FTE).

Please review the job summaries for each classification, located beneath the table, before entering salary data to ensure comparable matches.

---

	Match Title	Headcount	Yrs in Class (Avg)	Yrs in Class Range	Minimum\$	Midpoint\$	Maximum\$	Avg Salary\$
Maintenance Worker II	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Worker III	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Maintenance Supervisor	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Management Analyst	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Senior Accountant	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Assistant Planner	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Senior Engineer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Permit Coordinator	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Surface Water Program Coordinator	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Intergovernmental Affairs Coordinator	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Procurement Contract Manager	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
IS Manager	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Assistant Public Works Director	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Public Works Director	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Finance Director	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
City Clerk	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Development Services Director	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Assistant to the City Manager	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**If you have a file that includes the requested information, or for all of your classifications, you may upload the file here and skip filling out the table below.**

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**Maintenance Worker II**

Performs a variety of skilled maintenance and repair tasks within the city streets, roads, storm water facilities, parks, and city facilities requiring the use of hand tools, power tools, and light duty vehicles. Required to work as a crew lead, supervising Maintenance Workers, temporary/seasonal employees, and volunteers doing installation, repair, new construction, program support activities, and maintenance work or may function independently to perform tasks after receiving direction. Must be able to operate construction equipment to include a backhoe, dump truck, and small power machinery. Requires a High school diploma or equivalent. Five years experience in a maintenance position, with a minimum of 2 years in a supervisory role in the maintenance and repair of public streets, storm drains, facilities, grounds or landscaping.

**Maintenance Worker III**

Lead, oversee, schedule and perform a variety of complex and skilled maintenance and repair tasks within the city streets, roads, storm water facilities, parks, and city facilities requiring the use of hand tools, power tools, light duty vehicles and heavy equipment. Required to work as a crew lead, supervising, assigning work and monitoring Maintenance Workers, temporary/seasonal employees, and volunteers doing installation, repair, new construction, program support activities, and maintenance work or may function independently to perform tasks after receiving direction. Must be able to operate construction equipment to include a backhoe, dump truck, street sweeper and all small power machinery. Requires a High school diploma or equivalent. Five years experience in a maintenance position, minimum of 2 years in a supervisory role in the maintenance and repair of public streets, storm drains, facilities, grounds and landscaping.

**Maintenance Supervisor**

Middle-management position plans, directs, organizes, schedules, coordinates, reviews, evaluates, manages, and supervises comprehensive maintenance and repair programs of City infrastructure, including parks, buildings and facilities streets, surface water systems, and vehicle and equipment fleets. Manages Regular and Non-Regular in-house personnel and public and private contractors, prepares short- and long-range plans for maintenance operations; prepares analyses of most cost-effective means to provide services; develops bids, coordinates, schedules, supervises, and monitors field operations, assists with construction inspections and monitoring. High school graduate or equivalent and five years increasingly responsible experience maintaining infrastructure systems, including three years supervisory experience.

**Management Analyst**

Performs research and analytical work of a highly responsible nature including program, contract, budgetary, special project, and policy analysis and policy development. Responsible for preparing and assisting in the preparations of special studies, reports, and presentations. Assist with public relations for the City including the planning, organization, and scheduling of professional-level information and/or community/public relations activities. Bachelor's degree in Public Administration, Business Administration, Political Science or related field and two years of administrative/management experience is required. Master's degree in Public Administration or related field is highly desired.

**Senior Accountant**

Performs a variety of complex accounting and fiscal work in the administration of the City's financial program. Prepares Annual Financial Statement; analyzes and reports financial activities; prepares and distributes completed monthly, quarterly, and year-end reconciliations; researches and reviews financial data to assist other departments in preparing special reports and projects. Provides direction and instruction to other employees in the preparation of payroll, accounts payable, and accounts receivable activities. Bachelor's degree in accounting, and three years of general accounting experience, one of which must have been in municipal accounting.

**Assistant Planner**

Performs a variety of administrative and professional technical work primarily in the current planning programs of the City, including review and processing of building permits, site plans, and other land use applications; assists the general public with zoning and land use-related inquiries. Enforces the City's land use and development codes through site visits, responding to complaints, and achieving compliance. Bachelor's Degree in urban and regional planning, environmental sciences or related field. One year of experience in providing professional planning services

in a city or county, or as a contract planning consultant to city or county government.

### **Senior Engineer**

Responsible for managing assigned public works Capital Improvement Projects; including managing public involvement, overseeing and monitoring consultants and meeting schedule and budget objectives. Responsibilities include developing scope of work, performing or directing daily design engineering decisions, preparing reports, and overseeing expenditures. Requires a high degree of independent judgement and action in planning projects, resolving technical problems, and administering projects within the framework of established policies. Supervises assigned staff; and responds to citizen and contractor inquiries. Bachelor's degree in Civil Engineering, Construction Management or related field, and increasingly responsible engineering experience that demonstrates knowledge of construction project management and the preparation of plans, specifications, and contract documents.

### **Permit Coordinator**

Trains, directs, and organizes the work of Permit Technicians; manages, monitors, and performs all activities and functions of the permitting process to ensure compliance with city, county, state and federal requirements. Coordinates Permit Center work with other departments; and coordinates inspections with inspectors. Monitors permit processing from pre-design plan review to field construction inspection coordination and project close-out, and provides information to customers about development and permit regulations, and the status of their applications. High School Diploma/GED Certificate and three years of experience in land use or building construction permitting with customer service/public contact that includes permit review.

### **Surface Water Program Coordinator**

Administers program components and elements, coordinate the efforts of consultants and staff, and assist department(s) with all aspects of stormwater management. May direct the work of temporary and/or full-time staff working within programs or activities that support the Stormwater Program. Assists in reviews of storm water improvement plans for private developments and public projects. Oversees water quality and quantity issues for the City; coordinates with King and Snohomish County, State, and neighboring jurisdictions on regional water quality issues and surface water related projects. Manages storm water system through the development, preparation, and maintenance of the City Stormwater Management Program Plan. Bachelor's degree in Civil Engineering, Environmental Sciences, Natural Resources or related field. Two years' experience in stormwater management programs, environmental, engineering, or water resource field is preferred.

### **Intergovernmental Affairs Coordinator**

Develops strategies and recommendations on a wide variety of issues, policies, and programs to ensure regular, comprehensive City participation, either directly or through direct support to other staff or elected officials representing the City on a broad range of intergovernmental and regional issues, task groups, boards, committees, etc. Maintains constant vigilance on how the plans and activities of the City may intersect with other regional/stakeholder interests, and how regional initiatives may impact [REDACTED]. Advises City Manager and key staff on possible strategies for effectively managing intergovernmental and interjurisdictional relationships for the benefit of the City's interests. Bachelor's degree in Public Administration, Business Administration, Political Science, Policy, Communications or related field and two years of relevant experience in the public sector is required. A combination of relevant education and at least four years of directly relevant experience in a similar position may be considered for this position. Master's Degree in related field and municipal, state, and/or federal government experience preferred.

### **Procurement Contract Manager**

Implements, oversees and monitors a wide variety of contracts, professional and technical services agreements, memorandums of understanding and similar documents ranging from routine to difficult and complex. Exercises high level of expertise and independent judgment in ensuring compliance reflecting pertinent federal, state and local laws, mandates, priorities, objectives, regulations and guidelines. Works cooperatively with staff to monitor performance by contractors, consultants, service providers and the like, in accordance with general terms of contracts/agreements. Assists Departments throughout procurement process and project completion or termination date to ensure contract/agreement obligations are satisfied, revised as appropriate, and periodically monitored according to predetermined schedule. Bachelor's degree from an accredited college or university with major course work in business administration, public administration or a closely related field, and/or three or more years of experience with increasing responsibility in contract administration, business administration or procurement of goods and services or administration of public works contracts.

### **IS Manager**

Coordinate the development and maintenance of the City's IT, Telecommunication and Geographic Information System (GIS) for use by the City departments. Duties include project scoping, scheduling development, budgeting, monitoring, issue resolution, management of city data assets, procurement of hardware and software, implementation

and management of security procedures, development and maintenance of the central database and datasets, analysis, reports and modeling using a variety of software applications, server, desktop and network support. Bachelor's degree in computer science, system analysis, or closely related field, and five or more years experience with system analysis, project management, IT, GIS products and technologies.

#### **Assistant Public Works Director**

Responsible for managing assigned projects and/or programs, including but not limited to: capital improvement projects, surface water management system, development review, engineering plans and studies, and/or other departmental responsibilities; subject to strict schedule and financial constraints. Makes highly responsible and complex engineering decisions and provides professional engineering support and advice to the Public Works Director, departmental staff, project engineers, and city departments. Responsibilities include developing scopes of work; evaluating and assisting in selection of employees or consultants; performing or directing daily engineering decisions; preparing reports; reviewing private development plans for compliance with development regulations; overseeing expenditures; conducting public outreach and involvement with the community; developing programs or projects; and complying with local, regional, state, and federal regulations and agencies. Bachelor's degree in Civil Engineering, Construction Management, or related field; and seven years increasingly responsible engineering experience, including three years supervising other professional engineers. Preferred experience with construction project management with demonstrated knowledge in the preparation of plans, specifications, and contract documents; surface water engineering design and construction; and review of private development projects.

#### **Public Works Director**

Directs all functions of the Department of Public Works including engineering, public works, and contract administration and services provided to the City by other government jurisdictions and private providers. Contract services include: road maintenance, improvements and construction, surface water management, consulting engineering and other public services. Provides highly responsible and complex administrative support to the City Manager. Serves as City Engineer. Requires a Bachelors Degree in civil engineering or related engineering discipline and a minimum of four years of local government or private sector experience relating to the duties of this position, three of which must have been as a Public Works Director or equivalent.

#### **Finance Director**

Plans, directs, manages and oversees all activities and operations of the Finance/ Administration Department including accounting, budget, purchasing, debt management and investment, contract management, risk management, and functions and activities of the City Clerk; advises management and City Council on financial issues; coordinates assigned activities with other departments and outside agencies; oversees internal audit procedures; and, provides responsible and complex administrative support to the City Manager. Bachelor's Degree in Accounting, Finance, or Business Administration, with five years of increasingly responsible professional public sector municipal clerk and finance experience, including three years in a supervisory capacity.

#### **City Clerk**

Responsible for the management and preparation of City Council meeting agendas, council packets, and meeting notices pertaining to regular and special sessions; attends all City Council meetings and records items before the Council and actions taken; maintains official minutes of all proceedings, records, ordinances, resolutions, and other official City documents and public records. Maintains custody of official records and archives of the City including ordinances, resolutions, contracts, agreements, and minutes. Responsible for the maintenance, and indexing of official City records, and the enforcement of laws pertaining to public records. Bachelor's degree Public Administration, Business Administration, or related field, and four years increasingly responsible experience in a City Clerk's or related municipal operation including two years of administrative or Deputy Clerk experience.

#### **Development Services Director**

Plans, directs, manages and oversees all activities and operations of the Development Services Department including long-range and current planning, permitting, and building department functions. Responsible for policy development, program planning, budget management, operational direction, and maintaining an effective relationship with other operating departments, the Planning Commission, Executive Office, and development community. Bachelor's Degree in Urban Planning, Public Administration, or related field, and a minimum of five years local government or private sector experience relating to the duties of the position, three of which must have been in an administrative and supervisory capacity; or an equivalent combination of education and experience. Master's degree in Urban Planning or a related field and at least seven years in similar government position is preferred.

#### **Assistant to the City Manager**

Assists the City Manager by analyzing, planning, coordinating, directing, and assuming responsibility for assigned projects and administrative activities. Performs responsible and complex staff duties including policy research and analysis, the management, monitoring, and/or coordination of programs and contracts. Conducts necessary

evaluations of operational, administrative, and legislative issues; analyzes findings, develops recommendations, prepares reports and presents to a wide variety of audiences including the public, City Manager, and City Council. Bachelor's degree in Public Administration, Business Administration, Political Science or related field and four years of increasingly responsible high level administrative/ management experience in the public sector. Master's Degree in related field preferred.

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**Do you presently have a career ladder for the Accounting Clerk, Engineer, or Planner job families? If so, what are the tiers and related qualifications associated with each?**

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**Please enter or upload any additional salary information (including related policies) that you would like included in this study's assessment and market comparisons.**

**Additional Comments:**

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If you do not wish to comment or upload any additional information, please click "NEXT" to proceed to the submission page of this survey.

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## SURVEY SUBMISSION

When you have completed your survey, please select "**SUBMIT AS FINAL**" below and click the "**Next**" button to submit your survey responses.

If you wish to edit or review any of your responses, you may go back to previous questions by using the "**Back**" button.

**Thank you for your participation!**

**SUBMIT AS FINAL**

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## APPENDIX B:

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# CUSTOM MARKET SURVEY RESULTS

PEER ORGANIZATION	BENEFITS PERCENTAGE OF TOTAL COMPENSATION
<b>Peer Average</b>	<b>32.56%</b>
City of Kirkland	30.00%
City of Duvall	29.00%
City of Kenmore	35.00%
City of Monroe	32.50%
City of Lynnwood	37.00%
City of Issaquah	31.83%

PEER ORGANIZATION	What does your organization do to effectively attract and retain quality employees, while also providing current employees with opportunities for career growth?
City of Kirkland	Decent training budget and we are small enough to be very integrated with our work, but large enough to be able to work regionally at a high level. This provides more opportunities for our employees to interact with the public and other cities on projects.
City of Kenmore	varied, interesting, challenging work experience, tuition reimbursement program and generous training budgets, supportive city management and council, competitive salaries and benefits.
City of Monroe	It is the goal of the City of Monroe to attract a diverse and well-rounded team that provides top level service to our community. To attract the right employees, recruitment is conducted on a wide scale. Focus for recruitment is based on organizational fit. To retain employees the City of Monroe focuses on team building, autonomy, and sense of purpose within the organization. Opportunities are provided for career growth through training, mentorship, and understanding what skill sets necessary for career growth in the employees chosen career. The City of Monroe also believes in offering and maintaining a competitive salary and benefit scale that is frequently reviewed.
City of Lynnwood	Provides competitive salaries Provides training opportunities including tuition reimbursement Promotes from within when feasible
Lake Forest Park	Competitive salary & benefits package. Non-union salaries are compared to similar cities (size, assessed valuation, population) every 4-5 years and adjusted as necessary.

PEER ORGANIZATION	What is your organization's compensation policy regarding employees with long tenures, or those employees that reach the top of their pay range?
City of Kirkland	Our unions have longevity benefits so that long term employees receive extra pay each month for their years of service. Our vacation balances also reflect a high level of reward for years of service.
City of Kenmore	they only receive annual cost of living adjustments
City of Monroe	Salaries of tenure employees are reviewed on a yearly basis for cost of living increases. Longevity pay is also offered for employees that are part of a collective bargaining agreement.
City of Lynnwood	Provides longevity pay
Lake Forest Park	None.

Title	Respondent Org	Respondent Organization Matching Title	Headcount	Years in Class (Average)	Years in Class (Range)	Min	Mid	Max	Average
Maintenance Worker II						\$ 60,590.40		\$ 75,463.20	\$ 67,200.00
	City of Kirkland	Senior Maintenance	13			\$ 64,084.80		\$ 78,062.40	
	City of Kenmore	Maintenance Workers	4	1	1				\$ 67,200.00
	City of Monroe	Maintenance Worker III	14			\$ 57,096.00		\$ 72,864.00	
Maintenance Worker III						\$ 68,343.20		\$ 84,723.60	\$ 67,754.00
	City of Kirkland	Leadperson	10			\$ 72,030.40		\$ 86,923.20	
	City of Kenmore	Lead Maintenance Worker	1	5					\$ 67,754.00
	City of Monroe	Maintenance Worker III	3			\$ 64,656.00		\$ 82,524.00	
Maintenance Supervisor						\$ 86,587.00		\$ 111,182.50	\$ 88,018.00
	City of Kirkland	Various Supervisor	4			\$ 97,730.00		\$ 126,101.00	
	City of Kenmore	Maintenance Supervisor	1	1					\$ 88,018.00
	City of Monroe	Maintenance Supervisor	3			\$ 75,444.00		\$ 96,264.00	
Management Analyst						\$ 72,700.50		\$ 88,862.50	
	City of Kirkland	Management Analyst	2			\$ 78,513.00		\$ 92,369.00	
	City of Monroe	Management Analyst	1			\$ 66,888.00		\$ 85,356.00	
Senior Accountant						\$ 81,325.00		\$ 95,683.00	\$ 87,260.00
	City of Kirkland	Senior Accountant	2			\$ 81,325.00		\$ 95,683.00	
	City of Kenmore	Accountant	1	14					\$ 87,260.00
Assistant Planner						\$ 66,664.00		\$ 78,436.80	\$ 81,597.00
	City of Kirkland	Assistant Planner	4			\$ 66,664.00		\$ 78,436.80	
	City of Duvall	Assistant Planner	0.5						
	City of Kenmore	Planner	1	10					\$ 81,597.00
Senior Engineer						\$ 87,821.50		\$ 113,900.00	\$ 114,359.00
	City of Kirkland	Senior Engineer	6			\$ 101,891.00		\$ 119,872.00	
	City of Kenmore	Senior Engineer	1	14					\$ 114,359.00
	City of Monroe	Senior Engineer	2			\$ 73,752.00		\$ 107,928.00	
Permit Coordinator						\$ 75,444.00		\$ 96,264.00	\$ 55,607.00
	City of Kenmore	Permit Specialist	1	5					\$ 55,607.00
	City of Monroe	Permit Coordinator	1			\$ 75,444.00		\$ 96,264.00	
Surface Water Program Coordinator						\$ 77,028.50		\$ 93,954.00	\$ 118,933.00
	City of Kirkland	Surface Water Program Coordinator	1			\$ 87,169.00		\$ 102,552.00	
	City of Kenmore	Environmental Services Manager	1	11					\$ 118,933.00
	City of Monroe	Surface Water Program Coordinator	1			\$ 66,888.00		\$ 85,356.00	
Intergovernmental Affairs Coordinator						\$ 98,649.00		\$ 127,290.00	
	City of Kirkland	Intergovernmental Relations & Economic Development Manager	1			\$ 98,649.00		\$ 127,290.00	

Title	Respondent Org	Respondent Organization Matching Title	Headcount	Years in Class (Average)	Years in Class (Range)	Min	Mid	Max	Average
Procurement Contract Manager						\$ 85,066.50		\$ 109,222.00	
	City of Kirkland	Financial Operations Manager	1			\$ 94,689.00		\$ 122,180.00	
	City of Monroe	Procurement Contract Manager	1			\$ 75,444.00		\$ 96,264.00	
IS Manager						\$ 107,660.00		\$ 138,909.00	
	City of Kirkland	Is Manager	1			\$ 107,660.00		\$ 138,909.00	
Assistant Public Works Director						\$ 103,348.50		\$ 142,551.00	\$ 1,221,623.00
	City of Kirkland	Deputy Pw Directors	1			\$ 118,977.00		\$ 153,510.00	
	City of Kenmore	City Engineer	1	5					\$ 1,221,623.00
	City of Monroe	Assistant Public Works Director	1			\$ 87,720.00		\$ 131,592.00	
Public Works Director						\$ 71,699.00		\$ 93,849.50	
	City of Kirkland	Public Works Director	1			\$ 135,234.00		\$ 174,507.00	
	City of Monroe	Public Works Director	1			\$ 8,164.00		\$ 13,192.00	
Finance Director						\$ 116,819.00		\$ 162,620.50	\$ 158,721.00
	City of Kirkland	Finance Director	1			\$ 135,670.00		\$ 175,049.00	
	City of Kenmore	Finance Director	1	13					\$ 158,721.00
	City of Monroe	Finance Director	1			\$ 97,968.00		\$ 150,192.00	
City Clerk						\$ 81,728.00		\$ 107,241.50	\$ 104,497.00
	City of Kirkland	City Clerk	1			\$ 89,260.00		\$ 115,171.00	
	City of Kenmore	City Clerk	1	3					\$ 104,497.00
	City of Monroe	City Clerk	1			\$ 74,196.00		\$ 99,312.00	
Development Services Director						\$ 97,968.00		\$ 150,192.00	\$ 150,238.00
	City of Kenmore	Development Services Director	1	10					\$ 150,238.00
	City of Monroe	Development Services Director	1			\$ 97,968.00		\$ 150,192.00	
Assistant to the City Manager									\$ 170,685.00
	City of Kenmore	Assistant City Manager	1	13					\$ 170,685.00

## APPENDIX C:

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# MANAGEMENT ISSUES PAPER (MIP)

# MANAGEMENT ISSUES PAPER

This tool is designed to collect information about specific concerns that you may have related to your organization's current compensation and classification system. The information that you submit will be used to assist MGT Consulting Group, in the overall position evaluation and to make recommendations for updating and improving the current system.

Your Name: \_\_\_\_\_ Your Classification Title: \_\_\_\_\_

Department Name: \_\_\_\_\_

## Management Issue Detail:

**I. OFFICIAL CLASSIFICATION TITLE (JOB TITLE) RELATED TO ISSUE:** \_\_\_\_\_

### II. EMPLOYEES IN CLASS RELATED TO THE ISSUE:

*(Please list names of class incumbents. The back of this paper may be used for additional space if necessary):*

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### III. DESCRIPTION/RESOLUTION OF ISSUE:

CHECK ALL THAT APPLY	NATURE OF ISSUE	RECOMMENDED RESOLUTION
	<b>Recruitment/Retention</b> of qualified employees	
	<b>Current Pay Grade/Salary Range</b> should be revised/updated	Recommended New Pay Grade or Salary Range:
	<b>Classification Title</b> should be revised/updated	Recommended New Title:
	<b>Career Path/Advancement</b> for this Classification	Recommended New Series or Advancement level::
	<b>Other</b> (please briefly describe)	

### IV. BACKGROUND OF ISSUE:

Please briefly describe the nature of the issue(s) checked in Part III:

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Are other related classifications comparable to this classification in terms of required skill, effort, responsibility or working conditions? Please list titles and pay grades:

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## APPENDIX D:

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# JOB CONTENT QUESTIONNAIRE (JCQ)



# JOB CONTENT QUESTIONNAIRE©



3800 ESPLANADE WAY, SUITE 210 • TALLAHASSEE, FLORIDA 32311 • PHONE (850) 386-3191 • FAX (850) 385-4501

## INTRODUCTION

The following survey is designed to collect information about your role in the organization and the job that you perform.

### Survey results may be used to:

- Make pay adjustments to align individuals performing similar jobs within the organization or in similar organizations.
- Determine how your position compares to the market for pay.
- Determine if positions are accurately classified and if job titles accurately reflect position and duties.
- Ensure accurate and up-to-date job descriptions.
- Assist with staffing plan and salary schedule analyses.
- Identify positions requiring additional job analysis.

### This survey will NOT:

- Determine how well you perform your job. This is not a performance evaluation.
- Decide whether there are individuals who should be released or demoted.
- Reduce individual salaries or guarantee increases.

### This survey includes four main sections:

#### I. Basic Job-Related Information

Section 1.0 – Employment Status

#### II. Job Description, Duties, Responsibilities, and Requirements

Section 2.0 – Job Description

Section 3.0 – Job Duties

Section 4.0 – Knowledge, Skills, and Abilities

Section 5.0 – Function within the Organization

Section 6.0 – Educational Preparation

Section 7.0 – Experience Required

#### III. Work Performed, Responsibility and Leadership, Communication, and Decision-Making

Section 8.0 – Work Performed

Section 9.0 – Responsibility and Leadership

Section 10.0 – Communication

Section 11.0 – Decision-Making

#### IV. Financial Authority, Tools and Equipment, and Physical Job Factors

Section 12.0 – Financial Authority

Section 13.0 – Tools and Equipment Usage

Section 14.0 – Working Conditions and Physical Requirements

## I. BASIC JOB-RELATED INFORMATION

Name \_\_\_\_\_

E-mail \_\_\_\_\_ Phone \_\_\_\_\_

Supervisor's Name \_\_\_\_\_

Supervisor's E-mail \_\_\_\_\_

### SECTION 1.0 - EMPLOYMENT STATUS

Official Job Title: \_\_\_\_\_

Working Title:\* \_\_\_\_\_

\*Unofficial title if different from official title.

Status (choose one):  Full-time  Part-time

## II. JOB DESCRIPTION, DUTIES, RESPONSIBILITIES, AND REQUIREMENTS

### SECTION 2.0 - JOB DESCRIPTION

1. Please provide a brief general description of the purpose and responsibilities of your position (3-4 sentences). Please do not list specific duties here. You will list your specific duties in Section 3.0.

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2. Indicate the number of Full-time and Part-time individuals you supervise:  
(Supervision is the management or supervision of employees who report directly to you.)

Full-time \_\_\_\_\_ Part-time \_\_\_\_\_





## SECTION 5.0 - FUNCTION WITHIN THE ORGANIZATION

1. Please indicate the following organizational level that most closely matches your position within the organization and skip to the section indicated in parentheses at the bottom of this page. Once you have completed the section indicated in the parentheses, skip to Section 6.0 Educational Preparation.

- Clerical/Manual** (skip to SECTION 5.1) - Work involves clerical tasks; following standardized procedures, techniques, or procedures; and carrying out practices according to standards set by a supervisor or employers.
- Technical/Paraprofessional** (skip to SECTION 5.1) - Work involves inspecting, measuring, or comparing to a standard; utilizing special training to perform a defined function; following standardized procedures, techniques, or procedures.
- Computer Professional** (skip to SECTION 5.2) - Work involves maintaining/supporting computer software, hardware, or operating systems through activities like programming, designing, developing, documenting, and analyzing computer systems or software.
- Administrator** (skip to SECTION 5.3) - Work is directly related to assisting with running or servicing of the business or department.
- Professional** (skip to SECTION 5.3) - Work requires advanced learning acquired by a prolonged course of specialized intellectual instruction; or work involves advising clients or assisting customers or clients with running their business.
- Executive/Managerial** (skip to SECTION 5.4) - Work involves managing employees; planning, designing, or overseeing the implementation of organization projects or policies.

If you chose Clerical/Manual or Technical/Paraprofessional, skip to **SECTION 5.1**.

If you chose Computer Professional, skip to **SECTION 5.2**.

If you chose Administrator or Professional, skip to **SECTION 5.3**.

If you chose Executive/Managerial, skip to **SECTION 5.4**.

---

**SECTION 5.1 - ADMINISTRATIVE DUTIES**

*Only complete this section if you selected Clerical/Manual or Technical/Paraprofessional in Section 5.0, Function within the Organization. Next, skip to Section 6.0, Educational Preparation.*

1. Do your primary duties involve performing office or non-manual work directly related to management or general business operations of your employer or its clients?

Yes  No

2. Do your primary duties include the exercise of discretion and independent judgment in matters of significance?

*Discretion and independent judgment implies that the authority to make an independent choice, free from immediate direction or supervision. NOTE: You can exercise discretion and independent judgment even if your decisions or recommendations are reviewed at a higher level.*

Consider the following factors and check the applicable factors to guide you in determining whether to answer yes or no.

- Have authority to formulate, affect, interpret, or implement management policies or operating practices
- Carry out major assignments in conducting the operations of the organization
- Perform work that affects operations to a substantial degree
- Have authority to commit the employer in matters that have significant financial impact
- Have authority to waive or deviate from established policies and procedures, without prior approval
- Have authority to negotiate and bind the organization on significant matters
- Provide consultation or expert advice to management; involved in planning long- or short-term objectives
- Investigate and resolves matters of significance on behalf of management
- Represent the organization in handling complaints, arbitrating disputes or resolving grievances
- Make recommendations about significant matters to supervisors for action after comparing and evaluating possible courses of action

Yes  No

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**SECTION 5.2 - COMPUTER DUTIES**

*Only complete this section if you selected Computer Professional in Section 5.0, Function within the Organization. Next, skip to Section 6.0, Educational Preparation.*

1. Select "Yes" if your primary duties consist of the following:

- The application of systems analysis techniques and procedures, including consulting with users, to determine hardware, software or system functional specifications
- The design, development, documentation, analysis, creation, testing or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications
- The design, documentation, testing, creation or modification of computer programs related to machine operating systems
- A combination of the aforementioned duties, the performance of which requires the same level of skills

Yes  No

## SECTION 5.3 - ADMINISTRATIVE AND PROFESSIONAL DUTIES

*Only complete this section if you selected **Administrator** or **Professional** in Section 5.0, Function within the Organization. Next, skip to Section 6.0, Educational Preparation.*

1. **Do your primary duties involve performing office or non-manual work directly related to management or general operations of your employer or its clients?**

Yes  No

2. **Do your primary duties include the exercise of discretion and independent judgment in matters of significance?**

*Discretion and independent judgment implies that the authority to make an independent choice, free from immediate direction or supervision. NOTE: You can exercise discretion and independent judgment even if your decisions or recommendations are reviewed at a higher level.*

Consider the following factors to guide you in determining whether to answer yes or no.

- Have authority to formulate, affect, interpret, or implement management policies or operating practices
- Carry out major assignments in conducting the operations of the organization
- Perform work that affects operations to a substantial degree
- Have authority to commit the employer in matters that have significant financial impact
- Have authority to waive or deviate from established policies and procedures, without prior approval
- Have authority to negotiate and bind the organization on significant matters
- Provide consultation or expert advice to management; involved in planning long- or short-term objectives
- Investigate and resolves matters of significance on behalf of management
- Represent the organization in handling complaints, arbitrating disputes, or resolving grievances
- Make recommendations about significant matters to supervisors for action after comparing and evaluating possible courses of action

Yes  No

3. **Does your primary duty consist of work requiring advanced knowledge in a field of science or learning acquired by a prolonged course of specialized intellectual instruction as distinguished from a general academic education?**

Consider the following factors and definitions before answering yes or no.

- “Advanced knowledge” means work that is predominately intellectual in character, and which includes work requiring the consistent exercise of discretion and judgment
- Advanced knowledge is generally used to analyze, interpret or make deductions from varying facts or circumstances
- Advanced knowledge cannot be attained at the high school level
- “Prolonged course of specialized intellectual instruction” means that the learned professional exemption is limited to professions where specialized, academic training is a standard prerequisite for entering the profession

Yes  No

4. **Does your work require the use of creativity, invention, or imagination in a recognized field of artistic endeavor?**

Yes  No



5. Is your work predominantly intellectual and varied in character rather than routine mental, manual, mechanical or physical work?

Yes  No

## SECTION 5.4 - EXECUTIVE DUTIES

*Only complete this section if you selected Executive in Section 5.0, Function within the Organization. Next, skip to Section 6.0, Educational Preparation.*

1. Does your primary duty consist of managing a department or subdivision?

Factors to consider in determining importance of duty are:

- Supervising and directing the work of other employees, ordering items, managing the budget and authorizing
- The relative importance of your management duties as compared with other types of duties
- The amount of time you spend performing management work. Usually spending more than 50% of one's time performing management work will satisfy the primary duty requirement, but one can spend less time and also meet the primary duty requirement based on other factors
- Your relative freedom from direct supervision
- The relationship between your salary and the wages paid to other non-management workers for the same kind of non-management work

Consider the following management duties to guide you in determining whether to answer yes or no.

- Supervising employees and/or interviewing, selecting, and training of employees
- Setting and adjusting pay rates and work hours
- Directing the work of employees
- Conducting performance appraisals
- Handling employee complaints and grievances
- Disciplining employees
- Planning work and apportioning the work among the employees
- Running or servicing an organization, such as determining the items to be bought, stocked, and sold
- Planning and controlling the budget
- Monitoring or implementing legal compliance measures

Yes  No

2. Do you have the authority to hire and fire employees or do you provide suggestions or recommendations regarding hiring, firing, and advancement decisions, which are given weight in the decision-making process?

To determine weight, consider the following factors:

- The degree to which your duties require making suggestions and recommendations
- The frequency with which suggestions and recommendations are made or requested
- The frequency with which your suggestions and recommendations are relied upon

*Note:* You need not have authority to make the ultimate decision. Suggestions and recommendations may be reviewed by a higher level manager.

Yes  No

3. Do you regularly direct the work of two or more full-time employees?

Yes  No

4. Do you decide when to perform non-management duties, and when performing such duties do you remain responsible for the success or failure of the organization's operation?

Yes  No

5. Are you a shift manager or leader?

*Typically a shift manager is not responsible for success or failure of the business operation, but rather directs employees while also performing similar work to the employees.*

Yes  No

6. Does your primary duty consist of work requiring advanced knowledge in a field of science or learning acquired by a prolonged course of specialized intellectual instruction as distinguished from a general academic education?

Consider the following factors and definitions before answering yes or no.

- “Advanced knowledge” means work that is predominately intellectual in character, and which includes work requiring the consistent exercise of discretion and judgment
- Advanced knowledge is generally used to analyze, interpret or make deductions from varying facts or circumstances
- Advanced knowledge cannot be attained at the high school level
- “Prolonged course of specialized intellectual instruction” means that the learned professional exemption is limited to professions where specialized, academic training is a standard prerequisite for entering the profession

Yes  No

7. Does your work require the use of creativity, invention, or imagination in a recognized field of artistic endeavor?

Yes  No

8. Is your work predominantly intellectual and varied in character rather than routine mental, manual, mechanical or physical work?

Yes  No

**SECTION 6.0 - EDUCATIONAL**

1. What level of education is required for your position?

- |  |  |
|--|--|
| <input type="checkbox"/> Some high school education          | <input type="checkbox"/> Completion of a Bachelor’s degree |
| <input type="checkbox"/> Completion of high school/GED       | <input type="checkbox"/> Some graduate school education    |
| <input type="checkbox"/> Some college education              | <input type="checkbox"/> Completion of a Master’s degree   |
| <input type="checkbox"/> Completion of an Associate’s degree | <input type="checkbox"/> Completion of a Doctorate degree  |

2. What certifications, licenses, or professional designations, if any, are required for your position?

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3. What certifications, licenses, or professional designations, if any, are preferred for your position?

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**SECTION 7.0 - EXPERIENCE**

1. How much experience is required for your position?

- |   |                                  |                                    |
|---|----------------------------------|------------------------------------|
| <input type="checkbox"/> No experience required | <input type="checkbox"/> 3 years | <input type="checkbox"/> 7 years   |
| <input type="checkbox"/> 6 months               | <input type="checkbox"/> 4 years | <input type="checkbox"/> 8 years   |
| <input type="checkbox"/> 1 year                 | <input type="checkbox"/> 5 years | <input type="checkbox"/> 9 years   |
| <input type="checkbox"/> 2 years                | <input type="checkbox"/> 6 years | <input type="checkbox"/> +10 years |

2. Can education be substituted for experience?

- Yes  No  Do not know

3. Can experience be substituted for education?

- Yes  No  Do not know

### III. WORK PERFORMED, RESPONSIBILITY AND LEADERSHIP, COMMUNICATION, AND DECISION-MAKING JOB FACTORS

#### SECTION 8.0 - WORK PERFORMED

Please read each statement below and check the one that is the closest match to your major job duties.

CLOSEST FACTOR	FACTOR
	<p><b>Perform clerical or manual tasks</b>  <u>Example:</u>            May copy, compile, maintain basic files systems or enter data, or compute data using addition, subtraction, multiplication, and division; or compare items against a standard; or operate light equipment such as lawn mowers, floor buffers, pickup truck, van; or perform general housekeeping/custodial duties.</p>
	<p><b>Perform clerical or manual tasks involving intensive understanding of a field, unit or division</b>  <u>Example:</u>            May summarize, tabulate, or format data or information, or gather data and information for later evaluation; or perform arithmetic operations including basic geometry or algebra, including computing discounts, interest rates, ratios and/or percents; or uses or operates medium use equipment such as chainsaws, mowing equipment; or journeyman level trades work.</p>
	<p><b>Perform specialized technical work involving data collection, evaluation, analysis, and troubleshooting, or reports on operations and activities of a department, or performs general coordination of individual or departmental activities</b>  <u>Example:</u>            May use descriptive statistics, advanced geometry or algebra; requires the use of a wide range of administrative and/or technical methods in the solution of problems; or operate heavy construction equipment; or perform master level trades duties.</p>
	<p><b>Perform entry level professional work including basic data analysis and synthesis, or report on operations and activities of an organization; or perform quality assurance and compliance activities</b>  <u>Example:</u>            May use advanced algebra, inferential statistics, and/or financial models.</p>
	<p><b>Perform professional level work requiring a wide range of administrative, technical, scientific, engineering, accounting, legal, or managerial methods applied to complex problems</b>  <u>Example:</u>            May plan or direct the sequence of department or division activities</p>
	<p><b>Perform professional or managerial work including advanced data analysis and synthesis</b>  <u>Example:</u>            May develop policies, procedures, or methodologies based on new facts or knowledge; or interpret or apply established policies.</p>
	<p><b>Perform advanced professional work methods to formulate important recommendations or make technical decisions that have an organization-wide impact</b>  <u>Example:</u>            May require the use of creative ability and resourcefulness in the analysis and solution of complex problems; may develop new approaches or methodologies to solve problems not previously encountered.</p>
	<p><b>Perform executive or expert professional work to establish policy, long-range plans, and programs, identify funding sources and allocate funds</b>  <u>Example:</u>            May develop or use theoretical mathematical concepts to formulate new techniques, or make decisions that impact both the organization and the discipline.</p>

## SECTION 9.0 - RESPONSIBILITY AND LEADERSHIP

Please read each statement below and check the one that is the closest match to your major job duties.

CLOSEST FACTOR	FACTOR
	Follow instructions or work orders; <b>or</b> read routine sentences, instructions, regulations, or procedures.
	Follow technical instructions, procedure manuals and charts to solve practical problems, or compose routine or specialized reports or forms and business letters, or ensure compliance with clear guidelines and standards.
	Follow complex technical instructions, solve technical problems, or disseminate information regarding policies and procedures; may compose unique reports or analysis, or provide extensive customer service to internal or external customers.
	Follow complex rules or systems, using professional literature and technical reports; <b>or</b> enforce laws, rules, regulations, or ordinances.
	Supervise, instruct, or train others through explanation, demonstration, and supervised practice or make recommendations based on technical expertise. May have first-level supervisory duties including administration of performance feedback; <b>or</b> coordinate work activity schedules for teams.
	Direct, manage, or lead others; may determine work procedures, assign duties, maintain harmonious relations, or promote efficiency; may develop and administer operational programs; <b>or</b> may write or present extremely complex papers and reports.
	Formulate and issue policies, procedures, and instructions; responsible for long term planning within an agency, department or division.
	Guide organization-wide development; leads the development of organization mission, vision, and principles; directs capital improvement initiatives.

## SECTION 10.0 - COMMUNICATION

Please read each statement below and check the one that is the closest match to your major job duties.

CLOSEST FACTOR	FACTOR
	Communicate using routine sentences, complete routine job forms and incident reports, or communicate routine information regarding daily activities.
	Communicate to convey or exchange general work-related information or service to internal or external customers.
	Communicate information to guide or assist people; may give instructions or assignments to helpers or assistants.
	Communicate with internal and external groups, write manuals and complex reports, persuade or influence others in favor of a service, point of view, or course of action.
	Communicate information among co-workers, customers, vendors, and management; <b>or</b> speak before professional and civic groups; may write complex articles and reports or develop presentations for specialized audiences; may read scientific or technical journals or reports.
	Communicate with operational and functional leaders; read and interpret professional materials involving advanced bodies of knowledge.
	Communicates through negotiation and consensus building to exchange ideas, information, and opinions or develop decisions, conclusions, or solutions.
	Communicate with key stakeholders to affect long term planning and to secure organization position and resources.

## SECTION 11.0 - DECISION-MAKING

Please read each statement below and check the one that is the closest match to your major job duties.

CLOSEST FACTOR	FACTOR
	<p><b>Perform routine or semi-routine work under direct supervision.</b> Requires very few decisions, affecting only the individual.</p>
	<p><b>Perform semi-routine work involving set procedures, but which may require problem-solving, serve clients or co-workers, or respond to requests.</b> Requires some decisions that affect a few co-workers.</p>
	<p><b>Perform semi-skilled work involving some set procedures and frequent problem-solving.</b> Requires frequent decision making affecting co-workers or the general public; may be responsible for providing information to those who depend on a service.</p>
	<p><b>Perform skilled work involving almost constant problem solving.</b> May be responsible for actions of others, requiring almost constant decisions affecting co-workers, clients or others in the general public. ,</p>
	<p><b>Perform coordinating work involving guidelines and rules with constant problem-solving.</b> May be responsible for actions of others requiring development of procedures and constant decisions affecting subordinate workers, clients, or others in the general public.</p>
	<p><b>Perform management and supervisory work involving policy and guideline interpretation, solving both people and work-related problems.</b> Decision-making is a significant part of job, affecting a large segment of the organization and the general public.</p>
	<p><b>Perform advanced professional work involving the application of principles of logical thinking to diagnose or define problems, collect data and solve abstract problems with widespread unit or organization impact.</b> Work in a highly dynamic environment, responsible to establish goals, objectives and policies.</p>
	<p><b>Perform executive work involving the application of broad principles of professional management and leadership to new problems for which conventional solutions may or may not exist.</b> Responsible for long-range goals, planning, and methodologies; works in an evolving environment with emerging knowledge and technologies, competing priorities, and changing politics.</p>

## IV. FINANCIAL AUTHORITY, TOOLS AND EQUIPMENT, AND PHYSICAL LABOR FACTORS

### SECTION 12.0 - FINANCIAL AUTHORITY

Please read each sentence below and select all factors that represent the financial authority your job entails. (Check all that apply.)

- None/Not Applicable
- Handle cash transactions; prepare and process purchase orders.
- Bill or reconcile records, including departmental budget records and other related information such as subcontracts.
- Manage inventory, property, or loss control.
- Administer benefits by determining individual eligibility and coverage levels or determining compensation levels.
- Authorized to purchase goods or services worth more than \$100 without securing approval from another authority **or** able to make recommendations that impact resource allocation.
- Manage **or** administer budget within assigned department.
- Budget **or** allocate funds within or across departments or divisions.

### SECTION 13 - TOOLS AND EQUIPMENT

Please read each statement below and select all factors that represent the tools or equipment you use to perform your job. (Check all that apply.)

- None/Not Applicable
- Use office machines such as copiers or calculators.
- Use computers for data entry; **or** handle, use, **or** repair hand-held power equipment **or** light machinery.
- Use computers for word processing, spreadsheets, PowerPoint presentations or custom applications.
- Use, develop, **or** repair electronics **or** complex software, hardware, **or** network systems; operate, install, test **or** inspect heavy or complex machinery.
- Supervise the activities of those operating or repairing complex machinery or technology systems.
- Interpret policy and establish methods and procedures for acquiring, installing, testing, operating or repairing machinery or technology systems.
- Establish policy for the acquisition, installation, testing, operation, and maintenance of machinery or technology systems.
- Establish long-range plans and programs for capital improvements, major construction projects, or new technology systems.

**SECTION 14.0 - PHYSICAL JOB FACTORS**

Please provide details for the working conditions and physical demands that are required to successfully perform your job.

**1. Which of the following physical conditions and hazards are encountered in your position? (Check all that apply.)**

- Indoor environment
- Outdoor environment
- Noise
- Extreme temperatures
- Vibration
- Moisture and/or humidity
- Dust
- Fumes
- Gases
- Poor ventilation
- Electrical hazards
- Mechanical hazards
- Chemical hazards
- Explosive hazards
- Burn hazards
- Potential for violence/physical altercations
- Other \_\_\_\_\_
- Other \_\_\_\_\_

**2. How much time is spent doing the following activities in your position?**

Example: Position requires sitting over 2/3 of the time.

ACTIVITY	AMOUNT OF TIME SPENT			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gripping or feeling with hands	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching with hands and arms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing or balancing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stooping, kneeling, crouching, or crawling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talking or hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasting or smelling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



**3. Does this job require that weight be lifted? If so, how much and how often?**

*Example: Position requires lifting up to 25 pounds over 2/3 of the time.*

PHYSICAL REQUIREMENT: WEIGHT LIFTED	AMOUNT OF TIME SPENT			
	None	Under 1/3	1/3 to 2/3	Over 2/3
Up to 10 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 25 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Up to 100 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More than 100 pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**4. Does this job have any special vision requirements? (Check all that apply.)**

- No special vision requirements
- Close vision (clear vision at 20 inches or less)
- Distance vision (clear vision at 20 feet or more)
- Color vision (ability to identify and distinguish colors)
- Peripheral vision (ability to observe an area that can be seen up or down or to the left and right when vision is fixed on a given point)
- Depth perception (three-dimensional vision, ability to judge distances and spatial relationships)
- Ability to adjust focus (ability to adjust the eye to bring an object into sharp focus)

## SUPERVISOR'S COMMENTS

**Supervisor Instructions:**

Please review your employee's questionnaire carefully and check if you agree or disagree with the employee's choices or statements. Note any additional information that you feel is important to the understanding of this employee's work. If you disagree with any of the levels checked or statements made in this questionnaire, **we ask that you do not change any response nor ask the employee to change a response.** Rather, please indicate your comments on this page. If you need additional room, please add a page and staple it to this questionnaire. **Each section must be reviewed.** Failure to review each section thoroughly and to complete this section of the questionnaire will result in a delay in the evaluation process. Thank you for your time and attention to this process.

SECTION	AGREE	DISAGREE	COMMENTS
1.0	<input type="checkbox"/>	<input type="checkbox"/>	
2.0	<input type="checkbox"/>	<input type="checkbox"/>	
3.0	<input type="checkbox"/>	<input type="checkbox"/>	
4.0	<input type="checkbox"/>	<input type="checkbox"/>	
5.0	<input type="checkbox"/>	<input type="checkbox"/>	
6.0	<input type="checkbox"/>	<input type="checkbox"/>	
7.0	<input type="checkbox"/>	<input type="checkbox"/>	
8.0	<input type="checkbox"/>	<input type="checkbox"/>	
9.0	<input type="checkbox"/>	<input type="checkbox"/>	
10.0	<input type="checkbox"/>	<input type="checkbox"/>	
11.0	<input type="checkbox"/>	<input type="checkbox"/>	
12.0	<input type="checkbox"/>	<input type="checkbox"/>	
13.0	<input type="checkbox"/>	<input type="checkbox"/>	
14.0	<input type="checkbox"/>	<input type="checkbox"/>	

**Additional Comments:**

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*I certify that I have read and reviewed this questionnaire and that I have noted any additional information or areas of disagreement to the best of my ability.*

Supervisor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## APPENDIX E:

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### PRE-STUDY PAY SCHEDULE

Assigned Pay Range	Position Title	Annual Minimum Salary	Annual Maximum Salary
6	Facilities Maintenance Technician	\$ 43,890.00	\$ 56,015.00
25	Permit Technician II	\$ 53,023.00	\$ 67,673.00
25	Information Systems Technician	\$ 53,023.00	\$ 67,673.00
30	Administrative Assistant	\$ 55,728.00	\$ 71,125.00
30	Senior Accounting Clerk	\$ 55,728.00	\$ 71,125.00
30	Engineering Technician	\$ 55,728.00	\$ 71,125.00
30	Police Clerk	\$ 55,728.00	\$ 71,125.00
30	Assistant Planner	\$ 55,728.00	\$ 71,125.00
35	Building Inspector I	\$ 58,571.00	\$ 74,753.00
40	Permit Coordinator	\$ 61,559.00	\$ 78,566.00
42	Executive Assistant/Deputy City Clerk	\$ 62,796.00	\$ 80,145.00
49	Building Inspector II	\$ 67,326.00	\$ 85,927.00
49	Associate Planner	\$ 67,326.00	\$ 85,927.00
49	Surface Water Program Coordinator	\$ 67,326.00	\$ 85,927.00
55	Accountant	\$ 71,468.00	\$ 91,213.00
55	Senior Engineer I	\$ 71,468.00	\$ 91,213.00
55	Field Engineer	\$ 71,468.00	\$ 91,213.00
55	Management Analyst	\$ 71,468.00	\$ 91,213.00
55	Procurement/Contract Manager	\$ 71,468.00	\$ 91,213.00
61	Maintenance Supervisor	\$ 75,864.00	\$ 96,824.00
68	City Clerk Engineer	\$ 81,337.00	\$ 103,809.00
68	Senior Planner	\$ 81,337.00	\$ 103,809.00
68	Senior Intergovernmental Affairs Coordinator	\$ 81,337.00	\$ 103,809.00
71	Building Official	\$ 83,801.00	\$ 106,954.00
71	Information Systems Manager	\$ 83,801.00	\$ 106,954.00
80	Assistant to the City Manager	\$ 91,652.00	\$ 116,974.00
80	Assistant Public Works Director	\$ 91,652.00	\$ 116,974.00
80	Planning Manager	\$ 91,652.00	\$ 116,974.00
105	Director, Finance	\$ 117,538.00	\$ 150,011.00
105	Director, Development Services	\$ 117,538.00	\$ 150,011.00
105	Director, Public Works	\$ 117,538.00	\$ 150,011.00
CM	City Manager	\$ 176,099.00	\$ -

## APPENDIX F:

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# PROPOSED PAY SCHEDULE

<p style="text-align: center;"><b>20 # of Grades*</b></p> <p style="text-align: center;"><b>\$ 40,540.00 Minimum Market Value</b></p> <p style="text-align: center;"><b>\$ 137,240.00 Maximum Market Value*</b></p> <p style="text-align: center;"><b>6.25% - 7.15% % Avg Btwn Grades**</b></p> <p style="text-align: center;"><b>35.0% % Btwn Min/Max</b></p> <p style="text-align: center;"><b>28.0% % Btwn Min/Max</b></p> <p style="text-align: center;"><b>23.0% % Btwn Min/Max</b></p>		
Grade	Minimum	Maximum
1	\$ 40,540.00	\$ 54,729.00
2	\$ 43,073.75	\$ 58,149.56
3	\$ 45,765.86	\$ 61,783.91
4	\$ 48,626.23	\$ 65,645.40
5	\$ 51,665.36	\$ 69,748.24
6	\$ 54,894.45	\$ 74,107.51
7	\$ 58,325.35	\$ 78,739.23
8	\$ 61,970.69	\$ 83,660.43
9		
10	\$ 65,843.86	\$ 88,889.21
	\$ 69,959.10	\$ 94,444.78
11	\$ 74,331.54	\$ 100,347.58
12	\$ 78,977.26	\$ 106,619.30
13	\$ 84,625.15	\$ 108,320.19
14	\$ 90,676.93	\$ 116,066.47
15	\$ 97,161.49	\$ 124,366.71
16	\$ 104,109.78	\$ 133,260.52
17	\$ 111,554.96	\$ 137,212.60
18	\$ 119,532.57	\$ 147,025.06
19	\$ 128,080.68	\$ 157,539.23
20		
	\$ 137,240.08	\$ 168,805.30
CM	\$ 186,624.00	\$ -



## APPENDIX G:

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# GRADE ORDER LIST REPORT



Proposed Grade	Proposed Minimum	Proposed Maximum	Revised Class Title
1	\$ 40,540.00	\$ 54,729.00	LABORER I - SEASONAL
2	\$ 43,073.75	\$ 58,149.56	LABORER II - SEASONAL
3	\$ 45,765.86	\$ 61,783.91	FACILITIES MAINTENANCE TECHNICIAN
4	\$ 48,626.23	\$ 65,645.40	<i>CURRENTLY UNOCCUPIED</i>
5	\$ 51,665.36	\$ 69,748.24	MAINTENANCE WORKER II
6	\$ 54,894.45	\$ 74,107.51	INFORMATION SERVICES TECHNICIAN PERMIT TECHNICIAN II
7	\$ 58,325.35	\$ 78,739.23	ACCOUNTING SPECIALIST ASSISTANT PLANNER ENGINEER TECHNICIAN POLICE ADMINISTRATIVE SPECIALIST SENIOR ADMINISTRATIVE ASSISTANT
8	\$ 61,970.69	\$ 83,660.43	BUILDING INSPECTOR I MAINTENANCE WORKER III
9	\$ 65,843.86	\$ 88,889.21	EXECUTIVE ASSISTANT/DEPUTY CITY CLERK PERMIT COORDINATOR
10	\$ 69,959.10	\$ 94,444.78	ASSOCIATE PLANNER BUILDING INSPECTOR II SURFACE WATER PROGRAM COORDINATOR
11	\$ 74,331.54	\$ 100,347.58	STRATEGIC PROJECTS COORDINATOR
12	\$ 78,977.26	\$ 106,619.30	ACCOUNTING SUPERVISOR MAINTENANCE SUPERVISOR PROCUREMENT/CONTRACT MANAGER
13	\$ 84,625.15	\$ 108,320.19	CITY CLERK INTERGOVERNMENTAL AFFAIRS COORDINATOR SENIOR PLANNER ENGINEER I
14	\$ 90,676.93	\$ 116,066.47	BUILDING OFFICIAL INFORMATION SERVICES MANAGER ENGINEER II
15	\$ 97,161.49	\$ 124,366.71	SENIOR ENGINEER
16	\$ 104,109.78	\$ 133,260.52	PLANNING MANAGER
17	\$ 111,554.96	\$ 137,212.60	ASSISTANT PUBLIC WORKS DIRECTOR ASSISTANT TO THE CITY MANAGER
18	\$ 119,532.57	\$ 147,025.06	<i>CURRENTLY UNOCCUPIED</i>
19	\$ 128,080.68	\$ 157,539.23	DEVELOPMENT SERVICES DIRECTOR FINANCE DIRECTOR PUBLIC WORKS DIRECTOR
20	\$ 137,240.08	\$ 168,805.30	<i>CURRENTLY UNOCCUPIED</i>
CM	\$ 186,624.00	\$ -	CITY MANAGER

## APPENDIX H:

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# OUTLIERS REPORT

## EMPLOYEES BELOW MINIMUM OF CURRENT RANGE

ID	First Name	Last Name	Revised Class Title	Current Salary	Proposed Minimum Salary	Amount Below Proposed Minimum Salary
346			ENGINEER I	71472	\$ 84,625.15	\$ 13,153.15
309			CITY MANAGER	176100	\$ 186,624.00	\$ 10,524.00
323			ASSISTANT TO THE CITY MANAGER	106104	\$ 111,554.96	\$ 5,450.96
349			ASSISTANT TO THE CITY MANAGER	106104	\$ 111,554.96	\$ 5,450.96
347			SENIOR PLANNER	81336	\$ 84,625.15	\$ 3,289.15
348			ACCOUNTING SUPERVISOR	78792	\$ 78,977.26	\$ 185.26
317			ASSISTANT PUBLIC WORKS DIRECTOR	111408	\$ 111,554.96	\$ 146.96
					TOTAL:	\$ 38,200.44

## EMPLOYEES ABOVE MAXIMUM OF CURRENT RANGE

ID	First Name	Last Name	Revised Class Title	Current Salary	Proposed Maximum Salary	Amount Above Proposed Maximum Salary
42			MAINTENANCE WORKER II	70932	\$ 69,748.24	\$ 1,183.76
221			MAINTENANCE WORKER II	70932	\$ 69,748.24	\$ 1,183.76

APPENDIX I:

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IMPLEMENTATION REPORT

ID	First Name	Last Name	FTE	Revised Class Title	Current Salary	Proposed Salary	Adjustment to Minimum	Adjustment for Longevity	Total Adjustment Costs
22			1.00	SENIOR ENGINEER	\$ 103,812.00	\$ 124,366.71	\$ -	\$ 20,554.71	\$ 20,554.71
346			1.00	ENGINEER I	\$ 71,472.00	\$ 84,625.15	\$ 13,153.15	\$ -	\$ 13,153.15
309			1.00	CITY MANAGER	\$ 176,100.00	\$ 186,624.00	\$ 10,524.00	\$ -	\$ 10,524.00
121			1.00	PERMIT COORDINATOR	\$ 78,564.00	\$ 88,889.21	\$ -	\$ 10,325.21	\$ 10,325.21
74			1.00	MAINTENANCE SUPERVISOR	\$ 96,828.00	\$ 106,619.30	\$ -	\$ 9,791.30	\$ 9,791.30
317			1.00	ASSISTANT PUBLIC WORKS DIRECTOR	\$ 111,408.00	\$ 120,657.85	\$ 146.96	\$ 9,102.88	\$ 9,249.85
34			1.00	SENIOR ADMINISTRATIVE ASSISTANT	\$ 71,124.00	\$ 78,739.23	\$ -	\$ 7,615.23	\$ 7,615.23
122			1.00	POLICE ADMINISTRATIVE SPECIALIST	\$ 71,124.00	\$ 78,739.23	\$ -	\$ 7,615.23	\$ 7,615.23
249			1.00	ACCOUNTING SPECIALIST	\$ 71,124.00	\$ 78,739.23	\$ -	\$ 7,615.23	\$ 7,615.23
143			1.00	MAINTENANCE WORKER III	\$ 74,640.00	\$ 81,549.20	\$ -	\$ 6,909.20	\$ 6,909.20
280			1.00	FINANCE DIRECTOR	\$ 150,012.00	\$ 155,829.73	\$ -	\$ 5,817.73	\$ 5,817.73
323			1.00	ASSISTANT TO THE CITY MANAGER	\$ 106,104.00	\$ 111,554.96	\$ 5,450.96	\$ -	\$ 5,450.96
349			1.00	ASSISTANT TO THE CITY MANAGER	\$ 106,104.00	\$ 111,554.96	\$ 5,450.96	\$ -	\$ 5,450.96
347			1.00	SENIOR PLANNER	\$ 81,336.00	\$ 84,625.15	\$ 3,289.15	\$ -	\$ 3,289.15
322			1.00	CITY CLERK	\$ 85,404.00	\$ 88,010.15	\$ -	\$ 2,606.15	\$ 2,606.15
300			1.00	PLANNING MANAGER	\$ 106,104.00	\$ 108,274.17	\$ -	\$ 2,170.17	\$ 2,170.17
348			1.00	ACCOUNTING SUPERVISOR	\$ 78,792.00	\$ 78,977.26	\$ 185.26	\$ -	\$ 185.26
						<b>Totals:</b>	<b>\$ 38,200.44</b>	<b>\$ 90,123.03</b>	<b>\$ 128,323.46</b>

## APPENDIX J:

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# IMPLEMENTATION SUMMARY REPORT

Department	ESTIMATED ADJUSTMENT TO MINIMUM COSTS	ESTIMATED LONGEVITY COSTS	ESTIMATED TOTAL ADJUSTMENT COSTS
PUBLIC WORKS ENGINEERING	\$ 13,300.11	\$ 37,272.82	\$ 50,572.92
EXECUTIVE	\$ 21,425.92	\$ 2,606.15	\$ 24,032.07
PUBLIC WORKS MAINTENANCE	\$ -	\$ 16,700.50	\$ 16,700.50
DEVELOPMENT SERVICES	\$ 3,289.15	\$ 12,495.38	\$ 15,784.52
ADMINISTRATIVE SERVICES	\$ 185.26	\$ 13,432.95	\$ 13,618.22
POLICE SERVICES	\$ -	\$ 7,615.23	\$ 7,615.23
PARKS & RECREATION, PERMIT CENTER, PUBLIC WORKS	\$ -	\$ -	
PARKS, PUBLIC WORKS	\$ -	\$ -	
	<b>\$ 38,200.44</b>	<b>\$ 90,123.03</b>	<b>\$ 128,323.46</b>

## APPENDIX K:

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# IMPLEMENTATION STRATEGY REPORT



ID	First Name	Last Name	Revised Class Title	Current Salary	Year 1 Adjustments (Adjustments to Minimum)	Total Adjustment Costs Based on Market & Longevity	Proposed Salary Based on Market & Longevity Adjustments	Total Adjustment Costs Year 2 (Longevity)	Total Adjustment Costs Year 3 (Longevity)
22			SENIOR ENGINEER	\$ 103,812.00	\$ -	\$ 20,554.71	\$ 124,366.71	\$ 14,429.83	\$ 15,007.03
346			ENGINEER I	\$ 71,472.00	\$ 13,153.15	\$ 13,153.15	\$ 84,625.15	\$ 3,385.01	\$ 3,520.41
309			CITY MANAGER	\$ 176,100.00	\$ 10,524.00	\$ 10,524.00	\$ 186,624.00	\$ 7,464.96	\$ 7,763.56
121			PERMIT COORDINATOR	\$ 78,564.00	\$ -	\$ 10,325.21	\$ 88,889.21	\$ 8,305.16	\$ 8,637.37
74			MAINTENANCE SUPERVISOR	\$ 96,828.00	\$ -	\$ 9,791.30	\$ 106,619.30	\$ 8,768.77	\$ 9,119.52
317			ASSISTANT PUBLIC WORKS DIRECTOR	\$ 111,408.00	\$ 146.96	\$ 9,249.85	\$ 120,657.85	\$ 9,013.64	\$ 9,374.19
34			SENIOR ADMINISTRATIVE ASSISTANT	\$ 71,124.00	\$ -	\$ 7,615.23	\$ 78,739.23	\$ 6,652.57	\$ 6,918.68
122			POLICE ADMINISTRATIVE SPECIALIST	\$ 71,124.00	\$ -	\$ 7,615.23	\$ 78,739.23	\$ 6,652.57	\$ 6,918.68
249			ACCOUNTING SPECIALIST	\$ 71,124.00	\$ -	\$ 7,615.23	\$ 78,739.23	\$ 6,652.57	\$ 6,918.68
143			MAINTENANCE WORKER III	\$ 74,640.00	\$ -	\$ 6,909.20	\$ 81,549.20	\$ 6,440.20	\$ 6,697.81
280			FINANCE DIRECTOR	\$ 150,012.00	\$ -	\$ 5,817.73	\$ 155,829.73	\$ 8,909.34	\$ 9,265.72
323			ASSISTANT TO THE CITY MANAGER	\$ 106,104.00	\$ 5,450.96	\$ 5,450.96	\$ 111,554.96	\$ 4,462.20	\$ 4,640.69
349			ASSISTANT TO THE CITY MANAGER	\$ 106,104.00	\$ 5,450.96	\$ 5,450.96	\$ 111,554.96	\$ 4,462.20	\$ 4,640.69
347			SENIOR PLANNER	\$ 81,336.00	\$ 3,289.15	\$ 3,289.15	\$ 84,625.15	\$ 3,385.01	\$ 3,520.41
322			CITY CLERK	\$ 85,404.00	\$ -	\$ 2,606.15	\$ 88,010.15	\$ 4,719.24	\$ 4,908.01
300			PLANNING MANAGER	\$ 106,104.00	\$ -	\$ 2,170.17	\$ 108,274.17	\$ 5,329.24	\$ 5,542.41
348			ACCOUNTING SUPERVISOR	\$ 78,792.00	\$ 185.26	\$ 185.26	\$ 78,977.26	\$ 3,159.09	\$ 3,285.45
15			MAINTENANCE WORKER III	\$ 74,640.00	\$ -	\$ -	\$ 74,640.00	\$ 2,985.60	\$ 3,105.02
35			EXECUTIVE ASSISTANT/DEPUTY CITY CLERK	\$ 76,332.00	\$ -	\$ -	\$ 76,332.00	\$ 3,053.28	\$ 3,175.41
42			MAINTENANCE WORKER II	\$ 70,932.00	\$ -	\$ -	\$ 70,932.00	\$ 2,837.28	\$ 2,950.77
199			INFORMATION SERVICES MANAGER	\$ 106,956.00	\$ -	\$ -	\$ 106,956.00	\$ 4,278.24	\$ 4,449.37
221			MAINTENANCE WORKER II	\$ 70,932.00	\$ -	\$ -	\$ 70,932.00	\$ 2,837.28	\$ 2,950.77
275			MAINTENANCE WORKER II	\$ 60,708.00	\$ -	\$ -	\$ 60,708.00	\$ 2,428.32	\$ 2,525.45
278			MAINTENANCE WORKER II	\$ 70,932.00	\$ -	\$ -	\$ 70,932.00	\$ 2,837.28	\$ 2,950.77
286			PUBLIC WORKS DIRECTOR	\$ 150,012.00	\$ -	\$ -	\$ 150,012.00	\$ 6,000.48	\$ 6,240.50
296			PERMIT TECHNICIAN II	\$ 67,668.00	\$ -	\$ -	\$ 67,668.00	\$ 2,706.72	\$ 2,814.99
301			ENGINEER TECHNICIAN	\$ 67,740.00	\$ -	\$ -	\$ 67,740.00	\$ 2,709.60	\$ 2,817.98
302			MAINTENANCE WORKER II	\$ 60,708.00	\$ -	\$ -	\$ 60,708.00	\$ 2,428.32	\$ 2,525.45
305			ENGINEER I	\$ 91,212.00	\$ -	\$ -	\$ 91,212.00	\$ 3,648.48	\$ 3,794.42
320			BUILDING OFFICIAL	\$ 106,956.00	\$ -	\$ -	\$ 106,956.00	\$ 4,278.24	\$ 4,449.37
324			PROCUREMENT/CONTRACT MANAGER	\$ 91,212.00	\$ -	\$ -	\$ 91,212.00	\$ 3,648.48	\$ 3,794.42
325			INFORMATION SERVICES TECHNICIAN	\$ 29,235.00	\$ -	\$ -	\$ 29,235.00	\$ 1,169.40	\$ 1,216.18
328			DEVELOPMENT SERVICES DIRECTOR	\$ 150,012.00	\$ -	\$ -	\$ 150,012.00	\$ 6,000.48	\$ 6,240.50
330			ASSISTANT PLANNER	\$ 67,320.00	\$ -	\$ -	\$ 67,320.00	\$ 2,692.80	\$ 2,800.51
332			SENIOR ADMINISTRATIVE ASSISTANT	\$ 71,124.00	\$ -	\$ -	\$ 71,124.00	\$ 2,844.96	\$ 2,958.76
333			ASSISTANT PLANNER	\$ 67,320.00	\$ -	\$ -	\$ 67,320.00	\$ 2,692.80	\$ 2,800.51
337			SENIOR ENGINEER	\$ 103,812.00	\$ -	\$ -	\$ 103,812.00	\$ 4,152.48	\$ 4,318.58
338			STRATEGIC PROJECTS COORDINATOR	\$ 82,728.00	\$ -	\$ -	\$ 82,728.00	\$ 3,309.12	\$ 3,441.48
339			ASSOCIATE PLANNER	\$ 74,232.00	\$ -	\$ -	\$ 74,232.00	\$ 2,969.28	\$ 3,088.05
341			ACCOUNTING SPECIALIST	\$ 60,408.00	\$ -	\$ -	\$ 60,408.00	\$ 2,416.32	\$ 2,512.97
344			SURFACE WATER PROGRAM COORDINATOR	\$ 77,940.00	\$ -	\$ -	\$ 77,940.00	\$ 3,117.60	\$ 3,242.30
345			INTERGOVERNMENTAL AFFAIRS COORDINATOR	\$ 85,404.00	\$ -	\$ -	\$ 85,404.00	\$ 3,416.16	\$ 3,552.81
351			SENIOR ENGINEER	\$ 98,868.00	\$ -	\$ -	\$ 98,868.00	\$ 3,954.72	\$ 4,112.91
355			ACCOUNTING SPECIALIST	\$ 61,440.00	\$ -	\$ -	\$ 61,440.00	\$ 2,457.60	\$ 2,555.90
				<b>\$ 3,836,835.00</b>	<b>\$ 38,200.44</b>	<b>\$ 128,323.46</b>	<b>\$ 3,965,158.46</b>	<b>\$ 200,062.93</b>	<b>\$ 208,065.45</b>

## APPENDIX L:

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# LONGEVITY POLICY CHART

Grade	Proposed Minimum (YEAR 1)	Dollar Amount to be Spread over 8 Years	Percentage Annual Adj	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	Year 9 Proposed Maximum
1	\$ 40,540.00	\$ 14,189.00	4.00%	\$ 42,161.60	\$ 43,848.06	\$ 45,601.99	\$ 47,426.07	\$ 49,323.11	\$ 51,296.03	\$ 53,347.87	\$ 54,729.00
2	\$ 43,073.75	\$ 15,075.81	4.00%	\$ 44,796.70	\$ 46,588.57	\$ 48,452.11	\$ 50,390.20	\$ 52,405.80	\$ 54,502.04	\$ 56,682.12	\$ 58,149.56
3	\$ 45,765.86	\$ 16,018.05	4.00%	\$ 47,596.49	\$ 49,500.35	\$ 51,480.37	\$ 53,539.58	\$ 55,681.17	\$ 57,908.41	\$ 60,224.75	\$ 61,783.91
4	\$ 48,626.23	\$ 17,019.18	4.00%	\$ 50,571.27	\$ 52,594.13	\$ 54,697.89	\$ 56,885.81	\$ 59,161.24	\$ 61,527.69	\$ 63,988.80	\$ 65,645.40
5	\$ 51,665.36	\$ 18,082.88	4.00%	\$ 53,731.98	\$ 55,881.26	\$ 58,116.51	\$ 60,441.17	\$ 62,858.82	\$ 65,373.17	\$ 67,988.10	\$ 69,748.24
6	\$ 54,894.45	\$ 19,213.06	4.00%	\$ 57,090.23	\$ 59,373.84	\$ 61,748.79	\$ 64,218.74	\$ 66,787.49	\$ 69,458.99	\$ 72,237.35	\$ 74,107.51
7	\$ 58,325.35	\$ 20,413.87	4.00%	\$ 60,658.37	\$ 63,084.70	\$ 65,608.09	\$ 68,232.41	\$ 70,961.71	\$ 73,800.18	\$ 76,752.19	\$ 78,739.23
8	\$ 61,970.69	\$ 21,689.74	4.00%	\$ 64,449.52	\$ 67,027.50	\$ 69,708.60	\$ 72,496.94	\$ 75,396.82	\$ 78,412.69	\$ 81,549.20	\$ 83,660.43
9	\$ 65,843.86	\$ 23,045.35	4.00%	\$ 68,477.61	\$ 71,216.71	\$ 74,065.38	\$ 77,028.00	\$ 80,109.12	\$ 83,313.48	\$ 86,646.02	\$ 88,889.21
10	\$ 69,959.10	\$ 24,485.68	4.00%	\$ 72,757.46	\$ 75,667.76	\$ 78,694.47	\$ 81,842.25	\$ 85,115.94	\$ 88,520.58	\$ 92,061.40	\$ 94,444.78
11	\$ 74,331.54	\$ 26,016.04	4.00%	\$ 77,304.80	\$ 80,396.99	\$ 83,612.87	\$ 86,957.39	\$ 90,435.68	\$ 94,053.11	\$ 97,815.24	\$ 100,347.58
12	\$ 78,977.26	\$ 27,642.04	4.00%	\$ 82,136.35	\$ 85,421.81	\$ 88,838.68	\$ 92,392.23	\$ 96,087.91	\$ 99,931.43	\$ 103,928.69	\$ 106,619.30
13	\$ 84,625.15	\$ 23,695.04	4.00%	\$ 88,010.15	\$ 91,530.56	\$ 95,191.78	\$ 98,999.45	\$ 102,959.43	\$ 107,077.81	\$ 108,320.19	
14	\$ 90,676.93	\$ 25,389.54	4.00%	\$ 94,304.00	\$ 98,076.17	\$ 101,999.21	\$ 106,079.18	\$ 110,322.35	\$ 114,735.24	\$ 116,066.47	
15	\$ 97,161.49	\$ 27,205.22	4.00%	\$ 101,047.95	\$ 105,089.87	\$ 109,293.46	\$ 113,665.20	\$ 118,211.81	\$ 122,940.28	\$ 124,366.71	
16	\$ 104,109.78	\$ 29,150.74	4.00%	\$ 108,274.17	\$ 112,605.14	\$ 117,109.34	\$ 121,793.72	\$ 126,665.46	\$ 131,732.08	\$ 133,260.52	
17	\$ 111,554.96	\$ 25,657.64	4.00%	\$ 116,017.16	\$ 120,657.85	\$ 125,484.16	\$ 130,503.53	\$ 135,723.67	\$ 137,212.60		
18	\$ 119,532.57	\$ 27,492.49	4.00%	\$ 124,313.87	\$ 129,286.43	\$ 134,457.88	\$ 139,836.20	\$ 145,429.65	\$ 147,025.06		
19	\$ 128,080.68	\$ 29,458.56	4.00%	\$ 133,203.90	\$ 138,532.06	\$ 144,073.34	\$ 149,836.28	\$ 155,829.73	\$ 157,539.23		
20	\$ 137,240.08	\$ 31,565.22	4.00%	\$ 142,729.69	\$ 148,438.88	\$ 154,376.43	\$ 160,551.49	\$ 166,973.55	\$ 168,805.30		