

# A Proposal to Conduct a Compensation and Pay Classification Plan Study for the Raytown C-2 School District , MO

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Evergreen Solutions, LLC

April 5, 2021



# Evergreen Solutions, LLC

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March 31, 2021

Mr. Steve Shelton  
Associate Superintendent of Operations  
Raytown C-2 School District  
6608 Raytown Road  
Raytown, Missouri 64133

Dear Mr. Shelton:

Evergreen Solutions, LLC is pleased to submit a proposal to conduct a Compensation and Pay Classification Plan Study for the Raytown C-2 School District on behalf of the Board of Education. Our response is based on our review of the Request for Proposals, our experience working with hundreds of public sector organizations, including many school districts, our knowledge of the Missouri labor market, and as our knowledge of best practices in human resource management.

Evergreen Solutions was formed in 2004 to provide an alternative to traditional consulting practices and we provide an innovative and effective option to our clients by focusing on creating a partnership with you and not simply being another service provider.

Evergreen Solutions is a woman-owned, limited liability company, certified as an M/WBE in many states and municipalities throughout the country, including Missouri (#W03458). Evergreen is also authorized to transact business in the State of Missouri.

As a national firm, Evergreen Solutions continues to grow and our territory now includes 46 states. In the State of Missouri, Evergreen has worked with, or is currently on contract to work with, the following public sector organizations in providing work similar to the services being requested: **Liberty Public School District No. 53; Springfield R-12 School District;** Metropolitan Community College; Missouri Southern State University; Missouri Western State University; Southeast Missouri State University; Jackson County 16<sup>th</sup> judicial Circuit Court; City of Lee's Summit; City of Branson; City of Troy; City of Dardenne Prairie; City of Columbia; Jefferson County; Jackson County; and St. Charles County.

In other states, Evergreen has worked with, or is currently on contract to work with, the following school districts in a variety of human resources and management capacities: Ogden City School District, UT; Davis School District, UT; Los Angeles Unified School District, CA; Gadsden Independent School District, NM; Albuquerque Public Schools, NM; Wayside School District, TX; Toledo Public Schools, OH; Akron Public Schools, OH; Dayton Public Schools, OH; Cleveland Metropolitan School District, OH; School District of Philadelphia, PA; Minneapolis Public Schools, MN; Manchester Public Schools, CT; Needham Public Schools, MA; Town of Hamilton-Wenham Regional School District, MA; School Administrative Unit #29, NH; Portland Public Schools, ME; Fairfax County Public Schools, VA; Salem City Schools, VA; Roanoke County Public Schools, VA; Campbell County Public Schools, VA; York County School Division, VA; Suffolk Public Schools, VA; Montgomery County Public Schools, VA; Williamsburg-James City County Public Schools, VA; Pittsylvania County Schools, VA; Lee County Public Schools, VA; Bedford County Public Schools, VA; Goochland County Public Schools, VA; Loudoun County Public Schools, VA; Surry County Public Schools, VA; Prince George County Public Schools, VA; Manassas City Public Schools, VA; Stafford County Public Schools, VA; Danville Public Schools, VA; Floyd County Public Schools, VA; Caroline County Public Schools, VA; Culpeper County Public Schools, VA; Clarke County Public Schools, VA; Mecklenburg County Public Schools, VA; Martinsville City Public Schools, VA; Covington City Public Schools, VA; Alleghany County Public Schools, VA; Chesapeake Public Schools, VA; Jefferson County Schools, WV; Halifax County Schools, NC; Chapel Hill-Carrboro City Schools, NC; Chatham Public Schools, NC; Currituck County Schools, NC; Lee

County Public Schools, NC; Duplin County Public Schools, NC; Davie County Public Schools, NC; Burke County Public Schools, NC; Beaufort County School District, NC; Wayne County Public Schools, NC; Alamance-Burlington Public Schools, NC; Nash-Rocky Mount Public Schools, NC; Rock Hill Schools, SC; Orangeburg County Public Schools, SC; Richland County School Districts One and Two, SC; Pickens School District, SC; Atlanta Public Schools, GA; Sumter County Schools, GA; DeKalb County Public Schools, GA; Douglas County Schools, GA; Tuscaloosa City Schools, AL; Dothan City Schools, AL; Caddo Parish School Board, LA; Broward County School District, FL; Orange County School District, FL; Hillsborough County School District, FL; Miami-Dade County School District, FL; Clay County Public Schools, FL; and the School Board of Sarasota County, FL. Information regarding the services provided to some of these school district clients can be found in **Section 1** of our proposal.

Our proposed Evergreen Team is fully capable of comprehending the challenges and goals of the Raytown C-2 School District because of our vast understanding of K-12 human resources management. The Evergreen Team has considerable expertise in conducting compensation and pay classification plan studies for school districts and other public sector organizations throughout the country. Specific information about the qualifications of our proposed project team is provided in **Section 2** of our proposal.

Some of the human resource services Evergreen has focused on include: compensation and pay classification studies; pay equity studies; salary and benefits surveys; workload analyses; staffing studies; performance evaluation and appraisal system design; HR department reviews; recruitment, hiring, and retention studies; strategic and workforce planning; and labor pool availability.

Through our experiences in conducting this wide range of projects, our consultant team has gained extensive knowledge of all operations in K-12 human resources management. As a result, our consultants understand just how critical an effective classification and compensation system is to the overall operation of a proficient and progressive school district. Moreover, we have developed helpful methods and tools that assist our clients in implementing and maintaining our study recommendations and results.

Some of the key facets of Evergreen's approach as identified in **Section 4** includes:

- We emphasize communication as key to the successful study completion as well as implementation. Our team understands that compensation by its very nature creates anxiety in teachers and staff. In order to ensure a successful study process and gain "buy-in" at implementation, leadership, supervisors, teachers, and staff should be involved in each step of the process. As a critical component of our communication plan, we provide continuous communication throughout the study in the form of meetings/conference calls and written progress reports.
- Our methodology utilizes the latest in technology and in order to reduce the cost to our client partners and enhance wider participation, we offer all of our tools in an electronic format. In essence, every step of the process can be completed on the Web. Further, our web-based **JobForce Manager** tool allows our client partners to facilitate implementation and eases the ongoing maintenance of the compensation system.
- We understand that one size does not fit all as some consultants provide the same overall solution to every client. Evergreen takes great pride in providing a variety of alternatives that allows our client partners to select the solution that best meets their business and human capital needs.

As President Emeritus of Evergreen Solutions, I am authorized to commit our firm contractually to this assignment.

We appreciate this opportunity and pledge to you our best effort if selected for this engagement. Should you have any questions, please feel free to contact me at: (850) 383-0111 or via email at [jeff@ConsultEvergreen.com](mailto:jeff@ConsultEvergreen.com).

Sincerely,

*Linda A. Recio*

Dr. Linda Recio  
President Emeritus  
Evergreen Solutions, LLC



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*Section 1.0*  
*Profile of Proposer*



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# 1.0 Profile of Proposer

Evergreen Solutions is well qualified to conduct a Compensation and Pay Classification Plan Study for the Raytown C-2 School District based on our experience in conducting these studies for hundreds of school districts and other public sector organizations across the country. In this section we provide the background and history of our company, a list of similar projects we have conducted or are currently on contract to conduct, and references.

## 1.1 Background and History of Company

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting company, which specializes in working with public sector organizations, including many school districts, across the nation. We provide a unique approach, rather than the “consulting as usual” method, by partnering with our clients to find innovative, real world solutions to public management.

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

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

Evergreen is a certified as a W/MBE in many states and municipalities throughout the country, including Missouri (#W03458). Evergreen is authorized to transact business in the State of Missouri (#FL0887744). Evergreen’s main office is located at 2878 Remington Green Circle, Tallahassee, Florida 32308 where most of the work for this study would be performed.

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

We invite you to browse our Web site at [www.ConsultEvergreen.com](http://www.ConsultEvergreen.com) or visit us on Facebook at [www.facebook.com](http://www.facebook.com) or LinkedIn at [www.linkedin.com](http://www.linkedin.com) for more information about our services, staff, and past experience.



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Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We accomplish that by applying a situation-responsive discipline that emphasizes:

- full visibility into the entire school district through research and discovery;
- a spirit of partnership with school district staff and leadership;
- sound recommendations based on best practices and proven methods; and
- a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have:

- extensive experience in conducting compensation and pay classification plan studies for school districts and other public sector organizations throughout the country, including Missouri;
- comprehensive experience in all components vital to the successful completion of this engagement,
- knowledge of relevant Missouri statutes and regulations as well as federal regulations;
- objectivity and flexibility due to the fact that we have no vested interests; and
- specialized analytical tools that we bring to the project.

Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with school districts, public sector, quasi-governmental, and non-profit organizations in 46 states throughout the country.

In **Exhibit 1-1** we include a list of some of the school districts that our consultant team has worked with, or is currently on contract to work with, that involved services similar in scope to the services being requested.



**Exhibit 1-1**  
**List of Selected School District Clients**

Fairfax County Public Schools, VA	Orangeburg County Public Schools, SC
Campbell County Public Schools, VA	Hopatcong School District, NJ
Chesapeake Public Schools, VA	School District of Philadelphia, PA
Virginia Beach City Public Schools, VA	Dayton Public Schools, OH
Lee County Public Schools, VA	Cleveland Metropolitan School District, OH
Prince George County Public Schools, VA	Toledo Public Schools, OH
Salem City Schools, VA	Akron Public Schools, OH
York County School Division, VA	Atlanta Public Schools, GA
Mecklenburg County Public Schools, VA	DeKalb County Schools, GA
Covington City Public Schools, VA	Douglas Public Schools, GA
Alleghany County Public Schools, VA	Sumter County Schools, GA
Martinsville City Public Schools, VA	Tuscaloosa City Schools, AL
Williamsburg-James City Co. Public Schools, VA	Dothan City Schools, AL
Culpeper County Public Schools, VA	Clay County Public Schools, FL
Montgomery County Public Schools, VA	Martin County Public Schools, FL
Clarke County Public Schools, VA	Lee County Public Schools, FL
Suffolk Public Schools, VA	Orange County Public Schools, FL
Roanoke County Public Schools, VA	Pinellas County School District, FL
Stafford County Public Schools, VA	Hillsborough County School District, FL
Spotsylvania County Public Schools, VA	Miami-Dade County Public Schools, FL
Bedford County Public Schools, VA	Broward County Public Schools, FL
Danville Public Schools, VA	Okaloosa County School District, FL
Pittsylvania County Schools, VA	Brevard County School District, FL
Loudoun County Public Schools, VA	Escambia County School District, FL
Manassas City Public Schools, VA	Monroe County School District, FL
Surry County Public Schools, VA	St. Lucie County School District, FL
Jefferson County Schools, WV	Manchester Public Schools, CT
Beaufort County School District, NC	Hamilton-Wenham Regional School District, MA
Duplin County School District, NC	Needham Public Schools, MA
Davie County Public Schools, NC	School Administrative Unit #29, NH
Lee County Public Schools, NC	Portland Public Schools, ME
Burke County School District, NC	Caddo Parish School District, LA
Alamance-Burlington School System, NC	<b>Springfield R-12 School District, MO</b>
Halifax County Public Schools, NC	<b>Liberty Public School District #53, MO</b>
Chapel Hill-Carrboro City Schools, NC	Minneapolis Public Schools, MN
Nash-Rocky Mount Public Schools, NC	Wayside School District, TX
Wayne County Public Schools, NC	Cement Public Schools, OK
Chatham Public Schools, NC	Tipton and Clinton Public Schools, OK
Currituck County Schools, NC	Wewoka and Little Axe Public Schools, OK
Richland County School District One, SC	Albuquerque Public Schools, NM
Richland County School District Two, SC	Gadsden Independent School District, NM
Horry County Schools, SC	Davis School District, UT
Rock Hill Schools, SC	Ogden City School District, UT
Pickens County Schools, SC	Los Angeles Unified School District, CA



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## 1.2 Select Relevant Experience

Because Evergreen has conducted more than 600 classification and/or compensation studies for public sector organizations across the country, we include in this section only a sample of some of the K-12 projects that we have worked on, or are currently on contact to work on, that involved work similar in scope to the services being requested. Note: We have included in the **Appendix**, a sample final report for a similar study we conducted in the State of Missouri.

### **Compensation and Benefits Study Springfield R-12 School District, Missouri**

Evergreen Solutions is retained by the Springfield R-12 School District to conduct a Compensation and Benefits Study. Evergreen will conduct a full market salary and benefits analysis for all staff (3,987) with comparable labor markets to support the efforts of the District to attract and retain the best talent, while establishing a consistent and competitive market position within budgetary constraints. Evergreen will also compare the District's extra-duty salaries to peer organizations.

Evergreen will conduct an internal equity analysis by reviewing employee job descriptions and making recommendations for new job descriptions or updates to existing job descriptions according to the function each employee actually performs compared to their stated job description. Evergreen will further determine if there are compression or inequity issues and, if so, make recommendations for improvements.



### **Administrative Compensation and Classification Study Liberty Public School District #53, Missouri**

Evergreen Solutions was retained by the Liberty Public School District No. 53 (District) to conduct a Compensation and Classification Study for administrative staff. Evergreen assisted the District in reviewing and analyzing the current administrative staff compensation and benefit structure and made recommendations for improvements to the existing system(s) to ensure alignment with the Kansas City labor market were sufficient to recruit and place qualified applicants for these positions. Evergreen considered the total compensation package received by administrative staff employees with the District as it related to both the external and internal market.

Evergreen further provided an analysis of compensation policies and practices and provided recommendations to the District to formalize a long-term compensation strategy and provided a market pricing project of select administrative positions.



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**Compensation and Classification Study  
Liberty Public School District No. 53, Missouri**

Evergreen Solutions was retained by the Liberty Public School District No. 53 (District) to conduct a Compensation and Classification Study for non-certified staff (i.e., 862 support staff). Evergreen assisted the District in reviewing and analyzing the current support staff compensation and benefit structure and made recommendations for improvements to the existing system(s) to ensure that the alignment with the Kansas City labor market were sufficient to recruit and place qualified applicants for these positions that include Facilities & Maintenance, General Office Support, Kid's Zone, Medical, Nutrition Services, Para, Purchasing & Distribution, Security, Teacher Support, Technology, Therapist (Physical, Occupational, and Recreational) and Transportation. Evergreen considered the total compensation package received by support staff employees with the District as it related to both the external and internal market and provided an analysis of compensation policies and practices and made recommendations to formalize a long-term compensation strategy.



**Job Analysis, Classification, and Compensation Study  
Ogden City School District, Utah**

Evergreen was engaged with the Ogden City School District to complete a comprehensive analysis of district's classification and compensation system: while considering internal equity and external markets. This included, but was not limited to, conducting job analysis, rewriting job descriptions, as necessary, and making recommendations concerning classification systems and compensation structures.

Evergreen performed the following tasks:

- analyzed positions and write or revise job descriptions as necessary;
- made recommendations regarding FLSA exempt versus non-exempt status;
- recommended the appropriate designation/job classification for all positions, with written documentation in support of each of the recommendation;
- collected the appropriate information required to make a fair and reasonable determination for each of the selected positions, and to make classification and compensation recommendations for those positions;

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- reviewed the current job classification structures and recommended classifications and classification strategies;
  - provided a comprehensive report with recommendations for a compensation program that took into consideration internal equity and external job market factors; and
  - provided ongoing support in reviewing job descriptions for compensation classification.



### **Job Analysis, Classification, and Compensation Study Davis School District, Utah**

Evergreen Solutions was engaged with the Davis School District to conduct a Job Analysis, Classification, and Compensation Study. Evergreen analyzed positions and wrote/revised job descriptions, as necessary, and made recommendations regarding FLSA exempt versus non-exempt status. Evergreen recommended the appropriate designation/job classification for all positions, with written documentation in support of each of those recommendations. Evergreen's consultants collected the appropriate information required to make a fair and reasonable determination for each of the selected positions, and made classification and compensation recommendations for those positions. Evergreen further reviewed the current job classification structures and recommended classifications and classification strategies which included the drafting of specifications for new classifications. In the end, Evergreen provided a comprehensive report with recommendations for a compensation program that took into consideration internal equity and external job market factors. Evergreen provided ongoing support in reviewing job descriptions for compensation classification.



### **Survey of Standard Billing Rates Los Angeles School District, California**

Evergreen Solutions was selected by the Los Angeles Unified School District (LAUSD), Office of the Inspector General (OIG), to conduct a comprehensive market survey to determine standard billing rates for construction management firms in the Los Angeles/Orange County area. The specific objective of the survey was to establish acceptable, competitive, and all inclusive billing rates for proposals received from interested construction and engineering firms in response to RFPs issued by LAUSD Facilities Contracts.

Evergreen initiated the project with a comprehensive assessment of the current economic environment in the Los Angeles area; results from previous surveys; and available historical data related to construction

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management billing rates. Based on the results of this analysis, Evergreen worked with the district to identify firms that should, and should not be included in the market survey. The survey was sent to all applicable construction management firms that acted in a prime contractor capacity and were ready, willing, and able to provide services to LAUSD. From participating peers, Evergreen solicited information on salary levels, benefits offerings, rate increases, overhead attributed to specific positions, and a number of other factors.

Upon completing the collection of market data, Evergreen conducted a statistical analysis of the data and built a total compensation profile of the marketplace for each position and provided the OIG with billing rate recommendations to place LAUSD construction contractors competitively within the total compensation market. Results from the study were presented in a final report to the OIG.



**Classification and Compensation Study  
Blaine County School District No. 61, Idaho**

Evergreen Solutions was recently hired by the Blaine County School District No.61 to conduct a Classification and Compensation Study for Administrators, Certified Employees, Classified Employees, Athletic Coaches, and Stipend positions. Evergreen will conduct job analysis analysis and provide recommendations to update and/or create accurate job descriptions for the selected positions. The analysis will include recommendations to condense position descriptions where positions are of the same job family and classification as well as to create internal career “ladders” for some positions (e.g., Custodian I, II, Lead Custodian, Custodial Supervisor). Evergreen will further conduct an external market study of comparative employers to determine if salaries in all categories are competitive. The study will include a compensation plan focused on internal equity and will include a guideline for future new job descriptions and related compensation as well as how to review established job descriptions and make related adjustments to compensation.

In the end, Evergreen will recommend a classification and compensation structure that will attract and retain high caliber employees, and that will employ a clear path of career progression.



**Compensation and Classification Study  
Gadsden Independent School District, New Mexico**

Gadsden ISD in Gadsden County, New Mexico contracted with Evergreen Solutions, LLC to conduct a Compensation and Classification Study to analyze and evaluate the competitive status of its compensation and classification system. Evergreen Solutions consultants evaluated the

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present system, conducted on-site orientation sessions and focus groups with employees and managers to familiarize them with the project as well as gather their feedback on the system. Additionally, Evergreen Solutions consultants met with senior managers and department heads to obtain their unique input as to the strengths and weakness of the system as it related to their specific area of expertise.

Employees offered further feedback into the process by completing a Job Assessment Tool (JAT) allowing Evergreen Solutions consultants to evaluate the classification structure and determine how work within the District is organized and identify potential areas of internal inequity.

Evergreen Solutions consultants then conducted a salary survey of peer organizations using representative benchmark classifications from the District and developed compensation and classification recommendations which addressed the issues uncovered through the analytical process and produced draft and final reports detailing the aforementioned recommendations.



#### **Human Resources Pay and Classification Study Albuquerque Public Schools, New Mexico**

Evergreen Solutions was contracted to assist Albuquerque Public Schools (APS) in a review of human resource policies and procedures and the classification and compensation system. The review included 635 non-union and non-instructional employees in 340 classifications. This study examined the APS existing salary schedules for the participating classifications as well as review the current compensation, education, and experience levels for internal and external equity. In the end, Evergreen Solutions made recommendations for salary schedules, ensured all positions properly fall into one of the four non-union classifications, made recommendations for changes in compensation and pay, and developed a phased compensation implementation plan.



#### **Compensation and Classification Study and Staffing Study Wayside School District, Texas**

Wayside School District, Texas, a private charter district, hired Evergreen Solutions to conduct a Compensation and Classification Study and a Staffing Study. Evergreen Solutions began Phase I by evaluating the District's current classification and compensation information and assisting in the development of an initial compensation philosophy.

Following these initial steps, Evergreen utilized the Job Assessment Tool© to evaluate and build a projected classification plan. Market and benefits surveys were conducted, and recommendations for strategic positioning were provided to the District. A final solution was documented and a plan

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for maintaining recommendations over time was presented. Phase II involved working with the District to determine the goals of the staffing study by gathering relevant background materials, developing a preliminary profile, and preparing a final staffing plan.



**Human Resources Department Review/Audit and Administrative Salary Study  
Akron Public Schools, Ohio**

Evergreen was engaged with Akron Public Schools (APS) to conduct a Human Resources Department Review/Audit and an Administrative Salary Study. Evergreen's consultants were tasks to:

- review Human Resources Department staff and processes to determine appropriate staffing levels and provide recommendations and strategies for the development of new and/or revised processes, programs and practices;
- recommend elimination and/or outsourcing of processes, programs or practices as deemed appropriate; and
- review Principal and Central Office Administrator Salary Schedules and provide recommendations as to whether revisions need to be made to the salary schedule and/or whether another type of salary system should be developed, i.e., merit pay system.



**Compensation Study  
Roanoke County Public Schools, Virginia**

Evergreen Solutions was retained by the County of Roanoke to conduct a Compensation Study of all pay scales for Roanoke County Public Schools (RCPS). To accomplish this, Evergreen conducted a full market salary analysis with comparable labor markets and developed a new compensation philosophy that supported RCPS efforts to attract and retain the best talent, while establishing a consistent and competitive market position within budgetary restrictions.

Evergreen performed the following tasks:

- analyzed and updated salary schedules while minimizing compression and assuring internal fairness and external competitiveness;

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- established guidelines that governed classification and compensation for all RCPS employees and included recommendations for compensation guidelines that would protect the integrity of the compensation system when, or if budget constraints threaten the system; and
  - evaluated all contracted RCPS employees' current salaries and made recommendations to establish proper salary placement, eliminate compression issues, and close the gap where inequities occurred. Evergreen's recommendations included the financial cost to the district, timelines, and an implementation strategy.

In the end, Evergreen recommended employee compensation models that were competitive with surrounding school divisions.



**Superintendent's Leadership Team Compensation External Review  
Fairfax County Public Schools, Virginia**

Evergreen Solutions was engaged with Fairfax County Public Schools (FCPS) to conduct a Superintendent's Leadership Team Compensation External Review. Evergreen's consultants collected, evaluated, and reviewed the current compensation and classification system; conducted a salary survey of FCPS peers, and provided recommendations for changes to the FCPS School Board. Evergreen also presented the Final Report at a School Board meeting.



**Pay Plan Study  
Bedford County Public Schools, Virginia**

Evergreen Solutions was retained by Bedford County Public Schools (BCPS) to conduct a Pay Plan Study by reviewing all pay scales (teacher scale, support staff scale, administrator scale, extracurricular activity scale, salary supplements, and VHSL (Va. High School League) coaching factors). Evergreen conducted focus group meetings with a sample of teachers, administrators, and classified staff to receive ideas on pay plan enhancements. For the teacher scale, Evergreen recommended best methods and presented teacher pay scale options to eliminate compression in the existing teacher scale, particularly in the beginning area of the scale, while maintaining a maximum of 30 steps; conducted a salary survey and compared BCPS salaries to comparable school divisions that would be mutually identified; and developed a standard policy for the school division to follow consistently in future years if there is available funding to provide a one-time bonus/payment is granted to teachers but not a recurring increase (raise).



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In the end, Evergreen provided BCPS with pay scales that will be sustainable for a number of years such as 10 years and costed out all recommendations, including options of phasing in any proposed scale changes over several years, if needed.



**Compensation and Classification Study  
Campbell County Public Schools, Virginia**

Evergreen Solutions was retained by Campbell County Public Schools to conduct a Compensation and Classification Study for classified employees. Evergreen conducted onsite interviews and focus groups. Classified employees completed a Job Assessment Tool and a market survey was conducted. Recommendations were provided on how to improve salaries for classified employees.



**Compensation Survey  
Caroline County Public Schools, Virginia**

Evergreen was engaged with Caroline County Public Schools (CCPS) to conduct a Compensation and Benefits Survey. Evergreen worked collaboratively with CCPS leaders to develop a new Compensation Plan that would support the division's efforts to attract and retain the best talent, while establishing a consistent and competitive market position within budgetary constraints.



**Pay and Classification Study  
Clarke County Public Schools, Virginia**

Evergreen Solutions was retained by Clarke County Public Schools (Division) to conduct a pay and classification study that would provide internal equity and yet allow the division to be competitive in the marketplace in attracting and retaining qualified employees. Evergreen's consultants: assisted the division in reviewing and updating existing job descriptions and specifications to uniformly reflect distinguishing characteristics, essential job functions, minimum qualifications, working conditions, license requirements, regulatory requirements, standby/call out responsibilities, etc. for all classifications; obtained market data and made recommendations on updating the division's classification plan to reflect the current market; reviewed current classification grade methodology, and proposed recommended strategies for the division; identified management, supervisory, professional, technical, and general employees, including Fair

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Labor Standards Act (FLSA) and Affordance Care Act (ACA) status (exempt/non-exempt); assisted in reviewing the division's current salary administration guidelines and made recommendations on implementing strategies that would pay employees for additional duties, education, and qualifications, and ensured that the compensation plan remained competitive in future years; and recommended appropriate salary range for each existing or proposed position based on the classification plan, the compensation survey results, experience, and internal relationships and equity.



**Classification Study  
Danville Public Schools, Virginia**

Evergreen Solutions was retained by Danville Public Schools (DPS) to conduct a Classification Study using the information collected from the administration of the Job Assessment Tool (JAT) earlier in the year.



**Salary Study  
Floyd County Public Schools, Virginia**

Evergreen Solutions was retained by Floyd County Public Schools to conduct a Salary Study. Evergreen conducted a full market salary analysis for the classified and administrative salary scales with comparable labor markets to support the efforts of the Division to attract and retain the best talent, while establishing a consistent and competitive market position within budgetary restrictions.



**Compensation Study  
Montgomery County Public Schools, Virginia**

Evergreen Solutions was retained by Montgomery County Public Schools (MCPS) to conduct a compensation study for all employees. Evergreen's consultants developed two compensation systems (i.e., step-based and peer-based) for teachers and staff (i.e., administrators; occupational/physical therapist assistants, speech language pathology assistants, interpreters – Levels I and II, occupational therapists, psychologists; administrative assistants; aides; support services staff; bus drivers and bus aides; and nutrition services) that addressed steps missed in recent years with regard to their pay plan. Evergreen also developed an implementation plan for the two systems that included the next 3 – 5 years

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and provided recommendations on changes needed to the current compensation systems.



**Pay Plan Study  
Montgomery County Public Schools, Virginia**

Evergreen was again hired by Montgomery County Public Schools (MCPS) to conduct a Pay Plan Study. Evergreen reviewed pay plans, recommended best practices, and presented teacher pay scale options to eliminate compression in the existing teacher scale, particularly in the beginning area of the scale while maintaining a maximum of 30 steps. Evergreen also recommended a unified pay scale that included all certified personnel including, administrators and professional personnel such as occupational physical therapist and assistance, speech language pathologist, and interpreters and recommended a unified pay scale that included all classified personnel (i.e., administrative assistance, custodians, bus drivers, maintenance personnel, instructional assistants (aides), cafeteria personnel).



**Compensation Study  
Pittsylvania County Schools, Virginia**

Evergreen was engaged with Pittsylvania County Schools (PCS) to provide a comprehensive review of the PCS pay scales which is a compensation model that includes the following scales/ranges: Teacher; Administrative; Therapists (Speech, Occupational, Physical Therapist); Classified (Teacher Aide, School Nurse, Nurse Coordinator, Office Personnel, Administrative Assistant and Specialist, Custodial, Mechanic); Bus Driver and Mini-bus Attendant; and School Nutrition (Manager and Worker).

Evergreen worked collaboratively with PCS leaders to develop a new Compensation Plan that would support PCS efforts to attract and retain the best talent, while establishing a consistent and competitive market position within PCS budget restrictions. Evergreen's consultants evaluated all contracted PCS employees' salaries and made recommendations to establish proper salary placement, eliminate compression issues, and close the gap where inequities occurred.



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## **Compensation and Classification Study Prince George County Public Schools, Virginia**

Evergreen was hired by Prince George County Public Schools (PGCPS) to perform a review of the Division's current classification and compensation structure for 900 full-time teaching and support staff. Evergreen consultants will perform the following tasks for both the compensation and classification component of the study:

### Compensation Study

- review current scales with recommendations for decompression and step differentiation;
- examine options to appropriately compensate staff for extra duty assignments ("stipends");
- provide a recommendation for policy on placing new employees on our salary scales;
- review all current employees for proper placement on our scales as per education and years of service at each level of employment;
- review current methodology for employee longevity; and
- provide recommendations for any and all methods to attract, retain, and reward staff.

### Classification Study

- review position descriptions for all employees within the current classification system;
- review and recommend changes as necessary to the proper designation of exempt/non-exempt status of positions with the Fair Labor Standards Act (FLSA);
- review and suggest enhancements to the current requirements for each position including education, experience, certification and other related material;
- provide a recommendation for policy on promotion/self-demotion of employees within the school division; and
- review of current types of employment contracts/agreements.



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**Classification and Compensation Study  
Stafford County Public Schools, Virginia**

Evergreen was retained by Stafford County Public Schools to conduct a Classification and Compensation Study. Evergreen's consultants conducted orientation sessions, focus groups, and interviews with employees, and collected Job Assessment Tools (JATs) employees.

Evergreen's consultants further conducted a comprehensive salary survey of local and regional employers to assess the market competitiveness of the school division. Finally, a detailed plan was developed to provide the Stafford County Public Schools with specific steps to implement an equitable and competitive compensation plan.



**Classification and Compensation Study  
Suffolk Public Schools, Virginia**

Evergreen was initially hired in 2007 by Suffolk Public Schools to conduct a division-wide Compensation and Classification Study for all employees. Evergreen provided Suffolk Public Schools with recommendations for the implementation of a revised pay plan.

Evergreen was again hired in 2014 to provide a Classification and Compensation Plan Update for Suffolk Public Schools on behalf of the Suffolk City School Board. As part of the study, Evergreen's consultants will conduct orientation sessions, focus groups, and interviews with employees, and collect Job Assessment Tools (JATs) from all 2,079 employees. Evergreen's consultants will conduct a comprehensive salary survey of local and regional employers to assess the market competitiveness of the school division. Finally, a detailed plan will be developed to provide the Suffolk Public Schools with specific steps to implement an equitable and competitive compensation plan.



**Compensation Study  
Botetourt County Public Schools, Virginia**

Evergreen Solutions was engaged with Botetourt Public Schools to conduct a Compensation Study for administrative positions. Evergreen's consultants reviewed current conditions and the District's compensation philosophy; conducted a market salary survey of approximately 10 classifications; provided compensation structure recommendations including implementation options with cost estimates; and prepared comprehensive draft and final reports outlining all of the results from each step involved in the study.

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**Classification and Compensation Study  
Surry County Public Schools, Virginia**

Evergreen Solutions is engaged with Surry County Public Schools to conduct a Classification and Compensation Study. Evergreen will conduct a job analysis to determine internal equity and will conduct a salary survey of peer organizations to determine the competitiveness of the Division salary structure. Evergreen will also review and revise job descriptions and make FLSA determinations.



**Salary and Compensation Study  
Jefferson County Schools, West Virginia**

Evergreen was engaged with Jefferson County Schools (JCS) to conduct a Salary and Compensation Study by providing a comprehensive compensation review and update of the classification/salary system for employees. Evergreen provided the Superintendent and School Board with a process for ascertaining equitable value of position classification on salary scales. Evergreen conducted a comparison of the JCS compensation for teachers, administrators, and classified positions with compensation scales of school systems identified as “market competitive” to JCS.

Evergreen conducted an extensive salary/wage survey comparison of all 55 counties within the state of West Virginia and used the results from the survey to prepare a revised or new salary schedule for all (professional and service) positions, extra-curricular pay stipends, and other pay schedules as identified by JCS. In the end, Evergreen recommended a salary schedule that would ensure JCS pay for every position within the District was the highest among the fifty-five (55) counties within the state of West Virginia.



**Salary Survey  
Chapel Hill-Carrboro City Schools, North Carolina**

Evergreen was engaged with Chapel Hill-Carrboro City Schools (CHCCS) to conduct a Salary Survey of Central Office and School Administrator positions. Evergreen performed the following tasks:

- reviewed the existing administrative salary schedule for 2017-18 in CHCCS as well as previous years;
- analyzed Spring 2017 legislative changes in the state salary schedule for principals;

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- gathered 2016-17 and 2107-18 salary schedules for school and central office administrators from the Alamance-Burlington School System, Chatham County Schools, Charlotte-Mecklenburg Schools, Durham Public Schools, Guilford County Schools, Orange County Schools, and the Wake County Public School System;
  - analyzed the peer school system administrative schedules, including the use of experience, step system, pay for performance, longevity pay, and advanced degrees for administrators as it relates to compensation;
  - designed a multi-year salary solution for CHCCS administrators; and
  - prepared draft and final reports.

**Note:** This is the fourth project Evergreen Solutions has conducted with Chapel Hill-Carrboro City Schools.



**Comprehensive Salary Study  
Chatham Public Schools, North Carolina**

Evergreen was hired by Chatham Public Schools (CPS) to conduct a Comprehensive Salary Study targeted at building upon the strengths of the current compensation structure coupled with the analysis of market conditions and comparative data that will assist CPS in recruiting and retaining both certified and classified employees. The study will provide CPS enough information to develop a compensation structure that is responsive to their stated needs and will address external equity.

Evergreen will assess current payroll conditions by collecting and reviewing in-house data and developing a compensation structure and implementation cost plan based upon those results.



**Classification and Compensation Study  
Rock Hill Schools, South Carolina**

Evergreen Solutions is engaged with the Rock Hill School District (District) to conduct a Compensation and Classification Study. Evergreen Solutions' consultants will review the current classification and compensation methodology and systems for the District and use our Job Assessment Tool (JAT) and Management Issues Tool/(MIT) to gather data for recommendations to these systems. A market survey will be conducted to gather further data to determine external equity among the District's positions and further recommendations will be made. In addition,



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Evergreen Solutions' consultants will conduct an Organizational Structure Study to develop comprehensive organizational charts. **Note:** This project is nearing completion.



**Compensation and Classification Study and Staffing Analysis  
School District of Pickens County, South Carolina**

The Evergreen Solutions Team was hired by the School District of Pickens County, South Carolina, to conduct a Comprehensive Compensation and Classification Study for all employees and job classifications except teachers. The Evergreen Solutions Team conducted employee orientations, focus groups and interviews at multiple district locations, conducted job analyses of all included positions, conducted a comprehensive salary survey of the regional and statewide labor market peers, and provided detailed recommendations for adjusting the School District's pay and classification structure. The Evergreen Solutions Team also developed an implementation plan and cost plan. Additionally, the Evergreen Solutions Team conducted a staffing analysis of all central office functions, including a comprehensive survey of regional and statewide peer school districts, and made recommendations to adjust district staffing to achieve efficient and effective operations.



**Staffing Level Analysis/Audit and Salary Study  
Richland One School District, South Carolina**

Evergreen Solutions conducted a Staffing Audit and Salary Study of the Richland One School District. Evergreen Solutions conducted the review in the areas of human resources management, district organization and management, facilities, financial management, education service delivery, and public relations. In addition, Evergreen Solutions conducted a salary survey and job analysis. As part of this study, Evergreen Solutions conducted written surveys of central office administrators, principals and teachers.



**Compensation and Staffing Study  
Orangeburg County Public Schools, South Carolina**

Evergreen Solutions is retained by the Orangeburg County School District to conduct a compensation and staffing study. The study will include a review of compensation of all district personnel paid from all salary schedules to include supplement salary schedules (sports, band, and academic supplements). The study will also include review of staffing levels for positions paid from the district's salary schedule, in comparison to demographically comparable school districts.

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Essential tasks that will be completed in the study are as follows: review current salary schedules for all salary schedules; review the District's staffing levels and review job descriptions; gather and review salary information, to include supplements (sports, band, and academic supplements) from no fewer than five (5) demographically comparable South Carolina school districts; gather and review staffing information from no fewer than five (5) demographically comparable South Carolina school districts; gather and review salary information from competing organizations with which Orangeburg County School District wants to compete, the surrounding geographic regions, and other appropriate areas for positions similar to or the same as those paid from all salary schedules; provide comparison of Orangeburg's salaries paid from all salary schedules to the surveyed school districts; provide comparison of staffing levels for the administrative positions with the comparable school districts surveyed; and develop recommended salary schedules for all employee classifications paid from District's salary schedule.



**Compensation and Classification Study  
Sumter County Schools, Georgia**

The Evergreen Solutions Team was hired by Sumter County Schools in Americus, Georgia to conduct a Comprehensive Compensation and Classification Study for all employees and job classifications. The study included both instructional and non-instructional personnel. Although the study's primary emphasis was on ensuring that Sumter County Schools were compensating employees consistently with the market place, the study also ensured that employees were paid consistently with other classifications within the school district's internal structure. This study was the first significant study of its kind commissioned by the school district and serves as the baseline for future compensation and classification management actions. Evergreen Solutions provided detailed recommendations for adjusting the school district's pay and classification structure and developed an implementation plan complete with costing information.



**Salary Equity Study  
Douglas County School System, Georgia**

The Douglas County School System retained Evergreen Solutions to conduct a Salary Equity Study of the school system's classified employees. The school system, located west of the Metropolitan Atlanta, employed over 2,800 workers and served approximately 22,000 students at the time of the study.



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Evergreen assessed both internal and external equity of the County's compensation and classification plan, and provided recommendations for a new plan to cover employees. Evergreen Solutions provided Job Assessment Tool (JAT) completion support for several departments as part of the initial phase of the project. A market assessment was conducted taking into account local as well as regional peers to assess the current market position of the school system. Evergreen Solutions also utilized the JobForce Web module to provide the School System with comprehensive recommendations that moved the system to a more updated structure of human resource management.



**Classification and Compensation Study  
Dothan City Schools, Alabama**

Evergreen Solutions was retained by Dothan City Schools to conduct a Classification and Compensation Study for non-certified staff. The scope of the study included a: review and update and/or rewrite of all non-certified job descriptions; a revision of the existing pay plan and structure; and an evaluation of current salary structure and compensation levels for all non-certified positions, and recommendations for appropriate adjustments.



**Compensation and Classification Study  
Tuscaloosa City Schools, Alabama**

Evergreen was hired by Tuscaloosa City Schools (TCS) to conduct a Compensation and Classification Study for 1,400 employees. Employees participated in focus groups, interviews, and a job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Evergreen developed recommendations and guidelines for the continued administration and maintenance of the classification and compensation structure, including recommendations and guidelines related to: how employees would move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay had reached the maximum of their pay range or value of their position; the proper mix of pay; how often to adjust pay scales and survey the market; the timing of implementation; and how to keep the system fair and competitive over time.

Evergreen also provided instructional information to allow TCS staff to conduct individual salary audits and adjustments consistent with study methods until the next formal study is conducted and developed a plan that would allow TCS to maintain recommendations over time.

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**Job Classification and Compensation Study  
Escambia County School District, Florida**

Evergreen Solutions was engaged with Escambia County to conduct a Job Classification and Compensation Study for all of its employees. Evergreen assisted the County in: determining an appropriate pay philosophy, considering the location, recruitment areas, and financial restraints; conducting an extensive market analysis; identifying benchmark classifications that represent different levels, different departments and functions within the organization; and determining the County's relative market position based on comparable labor markets from the private and public sector that are providing equitable services.

Based upon results of the pay philosophy, market analysis, and the review of internal relationships between positions and classifications, Evergreen recommends a new pay structure and related employee salary adjustments that were based upon sound compensation principles in which both internal and external equity were considered with the pay structure as well as the concepts of equal pay for equal work. Evergreen provided recommendations on how to implement career progression based on education and/or certification requirements. The career progression provided support for succession planning via defining career paths or some other methodology. In addition, Evergreen recommended and assisted in implementation of a classification system and in the evaluation of positions that may be requested by employees or management after implementation.

In the end, Evergreen provided training for Human Resources employees to maintain the recommended classification and compensation plan and prepared a cost analysis for implementation of the proposed classification and compensation system with at least two options for such implementation.



**Compensation Study  
School Board of Highlands County, Florida**

Evergreen Solutions was retained by the School Board of Highlands County to conduct a Salary Survey for the Highlands County School District. Evergreen's consultants reviewed the effectiveness of the District's current pay plans as they related to the market competitiveness for attracting and retaining quality employees. Pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity in the current compensation system



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**Compensation Study  
School Board of Sarasota County, Florida**

Evergreen Solutions was retained by the School Board of Sarasota County to conduct a Salary Survey. Evergreen conducted a wage survey among 20 competing jurisdictions as well as public and private organizations to determine competitive wages in the appropriate labor market(s) for 50 benchmarks.



**Compensation Study  
Monroe County School District, Florida**

Evergreen was retained by Monroe County School District to conduct a Compensation Study for classified employees. Evergreen identified appropriate benchmarking standards and conduct a total compensation survey with comparable municipalities. Evergreen reviewed the total compensation system, developed a plan for selected employees, and provided implementation recommendations.



**Compensation and Classification Study  
Florida Virtual School**

Evergreen Solutions was again retained by Florida Virtual School (FLVS) to conduct a comprehensive compensation and classification study. The study included the proposed methodology to be used; a detailed market analysis and internal equity review; and recommendations that were fair, equitable, and competitive with both local public school districts and private employers with comparable organizational qualities to FLVS such as FTE; Operating Budget Size; Region; and industry. The study and recommendations took into consideration the current professional compensation strategies, pay practices and research, as well as applicable laws, statutes and regulations.

In the end, Evergreen developed alternative recommendations demonstrating the methodology FLVS should use to implement the compensation recommendations and the advantages and disadvantages and costs of each alternative.

**Note:** Evergreen previously conducted a similar study for FVS.



## 1.3 References

### **Compensation, Classification, and Organizational Design, and Structure Study (Included performance evaluation) Portland Public Schools, Maine**

Evergreen Solutions was retained by Portland Public Schools to conduct a detailed compensation and classification analysis of its total workforce. Employees participated in focus groups, interviews, and job analysis to determine the best classifications for the work performed. In addition, pay ranges were analyzed in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity. Also included in the study was a review of the performance evaluation system and tools. Recommendations were provided on how to improve the current system and the proper tools for evaluating employees.

We have provided the following four references that we feel demonstrate our experience within the past few years as it relates to the services being requested. We invite you to contact our client references as to the quality and timeliness of our consulting projects. Additional references are available upon request.

#### **Administrative Compensation and Classification Study Liberty Public School District #53, Missouri**

**Contact information:** Dr. Robert J. Vogelaar, Assistant Superintendent of Human Resources, (816) 736-5300, [robert.vogelaar@lps53.org](mailto:robert.vogelaar@lps53.org)

**Date of Project:** Completed on May 24, 2017

**A copy of the final report is included in the Appendix.**

**Note:** Evergreen also previously worked for the District.



#### **Classification, Compensation, and Benefits Study Springfield R-12 School District, Missouri**

**Contact Information:** Carol Embree, Deputy Superintendent-Operations, (816), 709-5576, [cembree@spsmail.org](mailto:cembree@spsmail.org)

**Date of Project:** Completed on June 14, 2019.

**Note:** Ms. Embree will be retiring in two months.



#### **Classification and Compensation Study Florida Virtual School (K-12)**

**Contact Information:** Denise Arocho, Senior Compensation Specialist, (407) 513-3628, [darochod@flvs.net](mailto:darochod@flvs.net)

**Date of Project:** Completed on January 7, 2021.

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**Pay Plan Study**

**Salem City Schools, Virginia**

**Contact Information:** Mandy Hall, Director of Business, 510 South College Avenue, Salem, Virginia 24153, (540) 389-0130, [mhall@salem.k12.va.us](mailto:mhall@salem.k12.va.us)

**Date of Project:** Completed on October 27, 2020.

**Note:** Evergreen also previously worked for the Division.





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*Section 2.0*  
*Summary of Proposer's Qualifications*



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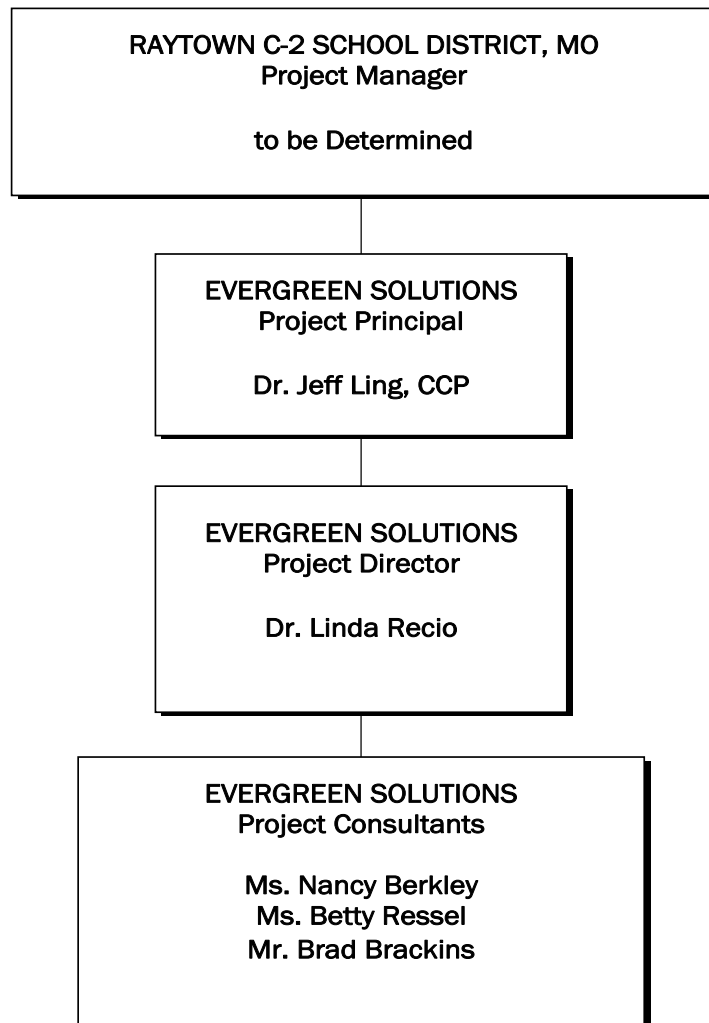
## 2.0 Summary of Proposer's Qualifications

In this section we provide the qualifications of the members of our proposed project team. Detailed resumes are included in the **Appendix**.

### 2.1 Proposed Project Team

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

Exhibit 2-1  
Proposed Project  
Management  
Organization and  
Personnel  
Assignments



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**Raytown C-2 School District Project Manager.** With each project engagement, we work with the client to identify one specific point of contact to serve as a Project Manager. The District's Project Manager will be our reference point throughout the engagement. We will take project direction, leadership, and guidance from the District's Project Manager and all project deliverables will be filtered through the District's Project Manager throughout the duration of the project.

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

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

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

Consultant Team Members must be thoroughly knowledgeable in the portion of the project they are responsible for, as well as have expertise in the issues that are unique to each individual client. Our firm is proposing an exceptional team of consultants who have worked together on many similar projects. We always make sure each project is sufficiently staffed to handle any additional tasks or unforeseen issues that may arise during the course of the study. The combination of our individual knowledge and skills form a superior team who will be able to competently perform all of the pieces of the Compensation and Pay Classification Plan Study for the Raytown C-2 School District.

## 2.2 Key Staff

In this section we provide **summary resumes** of the qualifications and experience of our proposed project team through our background and similar project work they have successfully conducted for school district clients as well as other public sector organizations.

### Project Principal Dr. Jeffrey Ling, CCP

Dr. Jeff Ling is the President of Evergreen Solutions and has been with the firm since its inception in 2004. He is a Certified Compensation Professional (CCP) with more than 26 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology;



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data management; surveys and polling; technology analysis; change management; and risk analysis.

For many of Evergreen's studies, Dr. Ling has planned, organized, and managed studies on human resources management for more than 800 organizations. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

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

- Classification/Compensation – Organizations have been using the methodology and techniques developed by Dr. Ling for successful data collection and implementation based on internal and external equity needs. **As the Project Principal, he has overseen more than 600 projects related to classification and/or compensation for school districts and other public sector organizations, including many in the State of Missouri.**
- Performance Evaluation – He has provided the framework for many organizations transitioning into goal-based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- Market Research – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- Policy Development – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

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



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**Project Director  
Dr. Linda Recio**

Dr. Linda Recio was the founding President of Evergreen Solutions in 2004 and recently became President Emeritus. She has over 30 years of experience in public education as a classroom teacher, teacher educator, school district administrator, director of state educational programs, and consultant. She has directed studies for Evergreen Solutions in the following states: Utah; California; New Mexico; Washington; Texas; Missouri, Oklahoma; South Carolina; Virginia, North Carolina, Florida; Georgia; Pennsylvania; Massachusetts; Connecticut; Ohio; Indiana; and several other states.

Early in her career, after serving as a middle school teacher, Dr. Recio worked as a consultant with the Florida Department of Education. While at the Department of Education, she was instrumental in developing the comprehensive audit criteria and data collection instruments utilized for conducting operational and management reviews in Florida's 67 school districts. These reviews included an evaluation of the human resources department. Following the development of the audit criteria, she served as team leader for audits that involved examining and evaluating procedures, records, and programs to determine compliance with federal, state, and local rules and regulations; providing assistance to the district administration in correcting deficiencies; and assisting school districts in operating efficiently and effectively. She conducted audits in Florida's 67 school districts including audits of Florida's large school districts of Miami-Dade, Broward, Duval and Palm Beach County.

Dr Recio has directed the following human resources studies for school districts: a Job Classification and Compensation Study for the Davis School District, UT; a Job Analysis, Classification, and Compensation Study for the Ogden City School District, UT; a Compensation Study for the City of Carlsbad, NM; a Pay and Classification Study for Albuquerque Public Schools, NM; a Salary Survey for the Los Angeles School District, CA; a Compensation and Classification Study for the Liberty Public School District No. 53, MO Salary Surveys for Chapel Hill-Carrboro City Schools, NC; a Comprehensive Salary Study for Chatham Public Schools, NC; a Salary and Compensation Study for Jefferson County Schools, WV; a Human Resources Department Review/Audit and an Administrative Salary Study for Akron Public Schools, OH; a Districtwide Job Classification and Compensation Study for the Escambia County School District, FL; a Compensation Study for Monroe County School District, FL; a Compensation and Classification Study for Dothan City Schools, AL. She has also directed classification and/or compensation studies for the following school divisions in the Commonwealth of Virginia: Suffolk Public Schools; Williamsburg-James City County Public Schools; Caroline County Public Schools; Prince George County Public Schools; Bedford County Public Schools; Salem City Schools; Pittsylvania County Schools; Floyd County Public Schools; Lee County Public Schools; Goochland County School Board; Danville Public Schools; and Spotsylvania County Public Schools.



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Dr. Recio has also directed the following the following studies for other public sector organizations: a Compensation study for Horry County Government, SC; a Classification and Compensation Study for the Town of Summerville, SC; a Compensation Study for Spokane County, WA; a Classification Study for Spokane County, WA; a Classification and Compensation and Equal Pay Study for the City of Albany, OR; a Classification and Compensation Study and Analysis for the City of Broken Arrow, OK; a Classification, Compensation and Benefits Study for Ogden City Corporation, UT; a Compensation Study for the Texas City Management Association; a Salary and Benefit Study for the City of Bloomington, IN; an Employee Compensation and Classification Study for the Western Reserve Transit Authority, OH; a Classification Study for Jefferson Community College, NY; a Classification and Compensation Study for Orange County Community College, NY; a Compensation, Classification, and Benefits Study for Spotsylvania County, VA; a Classification and Compensation Study for the Rivanna Water and Sewer Authority and the Rivanna Solid Waste Authority (Rivanna Authorities), VA; a Classification and Compensation Study for James City County, VA; a Compensation Study for the City of Jacksonville, FL; a Classification and Compensation Study for Florida Virtual School; a Pay and Classification Study for the Town of Lake Park, FL; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation and Pay Classification Plan Study for the City of Foley, AL; and a Classification Study for Spokane County, WA.

Dr. Recio is currently directing the following human resource studies: a Compensation and Staffing Study for the Orangeburg County School District, SC; and a Classification and Compensation Study for Surry County Public Schools, VA.

Following a 14-year career with the Department of Education, Dr. Recio joined the Leon County School System as an Assistant Superintendent where she was responsible for the district's strategic plan, school board policies and administrative procedures, staff plan, interagency and legislative planning, grants administration, and program evaluation.

For 15 years Dr. Recio was in charge of K-12 education, strategic planning, and marketing as a Senior Partner with MGT of America, a national consulting firm.

**Project Consultant  
Ms. Nancy Berkley**

Ms. Nancy Berkley is the Vice-President at Evergreen Solutions who has been with the firm more than seven years. She has over 30 years human resources experience demonstrating a thorough knowledge of multiple HR disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She



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has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excellent conflict resolution, negotiation, and influencing skills.

Ms. Berkley possesses expertise in the following HR areas:

- Designing and implementing a shared service, centralized virtual staffing organization, increasing efficiency of staffing function for hiring managers.
- Analyzing and responding to employee relation trends—positively influenced work environments reducing employee complaints by ~90 percent.
- Consulting with senior leaders and successfully leading project teams to develop new policies, programs and tools—including total revision and communication of a company’s HR policies and practices to be in accordance with state and federal laws;
- Creating HR metrics reviews utilizing business goals and human resources information systems data—set improvement goals and developed action plans for unique business requirements.
- Conceptualizing and implementing complex workforce reduction plans—then redeployed ~50 percent of the affected employees.
- Representing companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews—Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.

Some of the school district and higher education projects that Ms. Berkley has worked on include: a Compensation and Classification Study for the Liberty Public School District No. 53, MO; a Classification and Compensation Study for the Lone Star College System, TX; a Job Classification and Compensation Study for El Paso Community College District, TX; a Compensation Study for South Texas College; a Non-Faculty Compensation Review for Austin Community College, TX; a Comprehensive Compensation, Classification, and Organizational Design and Structure Study for Portland Public Schools, ME; a Performance Management Review for Morehead State University, KY; a Salary Scale Study for Loudoun County Public Schools, VA; a Compensation Study for the York County School Division, VA; a Classification and Compensation Study for Culpeper County Public Schools, VA; a Job Classification and





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Compensation Study for Chesapeake College, MD; a Pay Compression Study for Allegany College of MD; a Job Classification and Compensation Review for Morgan State University, MD; a Classified Employment Study for Chapel Hill-Carrboro City Schools, NC; a Compensation and Classification Study for Tuscaloosa City Schools, AL; Compensation Consulting Services for the State College of FL – Sarasota-Manatee; and a Salary Survey for the School Board of Sarasota County, FL. **Note: She is also directing two HR studies in Missouri with the City of Dardenne Prairie and the City of Troy.**

Ms. Berkley has a Bachelor's Degree in Psychology from Florida State University.

**Project Consultant  
Ms. Betty Ressel**

Ms. Ressel is a Managing Partner of Ressel and Associates, LLC, located in Austin, Texas. She has served on the Evergreen Team for more than nine years.

While with Evergreen, Ms. Ressel has performed the following human resource studies: a Compensation and Benefit Study for the Springfield R-12 School District, MO; a Salary Survey for the Los Angeles Unified School District, CA; a Job Classification and Compensation Study for the Davis School District, UT; a Job Analysis, Classification, and Compensation Study for the Ogden City School District, UT; a Salary Study for the City of Lakeway, TX; a Classification and Compensation Study for the City of Amarillo, TX; a Non-Faculty Compensation Review for Austin Community College, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Job Classification and Compensation Study for the El Paso Community College District, TX; a Classification and Compensation Study for the Lone Star College System, TX; Compensation Consultant Services for Dallas Area Rapid Transit, TX; a Classification and Compensation and Equal Pay Study for the City of Albany, OR; a Total Compensation Study for Spokane County, WA; a Human Resources Department Review/Audit and an Administrative Salary Study for Akron Public Schools, OH; a Classification and Compensation Study for the Lorain Metropolitan Housing Authority, OH; a Classification and Compensation Study for Rock Hill Schools, SC; a Compensation and Staffing Study for the Orangeburg County School District, SC; a Performance Audit of the Richland Two School District, SC; Consulting Services for Facility Department Processes for Horry County Schools, SC; a Classification and Compensation Study for Horry County Public Schools, SC; a Classification and Compensation Study for Charleston County, SC; a Compensation, Classification, and Benefits Study for Spotsylvania County and Spotsylvania County Public Schools, VA; a Temporary Work Assignment and Stipend Study for Goochland County Public Schools, VA; a Compensation Study for York County, VA; a Classification and Compensation Study for Stafford County Public Schools, VA; a Classification and Compensation Study for the Prince George County Public Schools, VA; a Classification Study for Danville Public Schools, VA; a Compensation Study for Roanoke County Public Schools, VA; a Salary and Compensation Study for Jefferson County Schools, WV; a Salary Survey for



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Chapel Hill-Carrboro City Schools, NC; a national Position Classification and Compensation Study for the Office of State Court Administrators, FL; a national Compensation Study of Forensic Pathologists for the City of Jacksonville, FL; a Districtwide Job Classification and Compensation Study for the Escambia County School District, FL; a Compensation Study for the City of North Miami Beach, FL; a Classification and Compensation Study for the Martin County, FL; a Compensation Study for the City of Sebring, FL; a Classification and Compensation Study for Douglas County, GA; a Classification and Compensation Study for Riviera Utilities, AL; and a Compensation and Pay Classification Plan Study for the City of Foley, AL.

As a former personnel manager and the director of several large divisions within a Texas state agency, Ms. Ressel also understands state and federal laws related to managing human resources. She strongly believes in the need for clear and accessible internal policies and procedures to guide management and staff through the process. She has developed flexible staffing allocation formulas that take into account the needs of small and large school districts and other state and local governmental entities and has first-hand experience working with contracts and contract employees.

Ms. Ressel has participated in and managed 105 efficiency, performance, and academic audits conducted by the Texas Comptroller's Office in school districts (100) and Higher Education Institutions (5), as well as reviews of state and local governmental agencies.

From 1993 to 2003, Ms. Ressel served as the Director of the Texas School Performance Review (TSPR). As one of her first acts in that position, Ms. Ressel envisioned and implemented several unique components to the reviews, including documented audit protocols and follow-up progress visits. While the notion of operational reviews was not new at that time, there were no documented processes or standards for conducting such reviews. The TSPR audit protocols for school districts and higher education institutions, which she authored and disseminated nationally after winning the 1999 Innovations in American Government Award, are now continually under reviewed and improved to ensure consistency of approach relevancy when conducting a school review.

In addition to directing audits/reviews, Ms. Ressel has personally gathered data for the audits in each of the functional areas, administered surveys, conducted interviews as well as small and large group facilitated sessions as part of the review process, formulated fully supported recommendations and commendations, and has written and edited entire reports.

Ms. Ressel is a Certified Public Accountant with extensive knowledge of school funding, financial management and school district investments. At the request of the Texas Legislature, she collaborated with a task force to write an investment and cash management guide, *Banks to Bonds: A Practical Path to Sound School District Investing*.



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**Project Consultant**  
**Mr. Bradley Brackins**

Mr. Brad Brackins is a Consultant at Evergreen who has been with the firm more than three years. With his background in data analysis and public administration, he assists public organizations in navigating the unique human resources challenges that they face today.

Mr. Brackins experience at Evergreen Solutions includes conducting compensation and classification studies. He works closely with organizations to gather employee feedback and organizational data in order to evaluate their current situation. He also conducts market studies in order to evaluate competitiveness with peer organizations. Through his research and analytical skills, he is able to use this information to formulate customized solutions that help public sector clients improve their ability to recruit and retain high-quality employees.

A sample of some of the public sector projects that Mr. Brackins has been involved with include: a Compensation and Benefits Study for the Springfield R-12 School District, MO; a Compensation and Classification Study for Jackson County 16th Judicial Circuit Court, MO; a Compensation Study Services for Jackson County, MO; a Classification and Compensation Study for Jefferson County, MO; Comprehensive Compensation Study for the City of Troy, MO; a Classification Compensation and Benefits Study for Ogden City Corporation, UT; a Total Compensation Study for Spokane County, WA; a Classification Study for Spokane County, WA; a Classification and Compensation Study for the City of Ridgefield, WA; Human Resources Consulting Services to the Redevelopment Authority for the County of Butler, PA; a Salary Survey for the City of Lakeway, TX; a Compensation and Classification Study and Staffing Study for Wayside School District, TX; a Salary Survey for the City of Carlsbad, NM; a Compensation Study for the City of Flagstaff, AZ; a Classification and Compensation Study for Rock Hill Schools, SC; a Compensation Study for Dorchester County, SC; a Compensation Study for Horry County Government, SC; a Wage and Compensation Analysis for the City of Isle of Palms, SC; an Emergency Medical Services Salary Study for Spartanburg County, SC; an Employee Evaluation System for the North Charleston Sewer District, SC; a Pay and Classification Study for Buncombe County, NC; a Compensation and Classification Study for the City of Goldsboro, NC; a Compensation and Classification Study for Union County, NC; a Compensation, Classification and Benefits Study for Haywood County, NC; a Classification and Compensation Study for the City of Hendersonville, NC; a Personnel Policy and Salary Study for Northumberland County, VA; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Classification and Compensation Study for Shenandoah County, VA; a Classification and Compensation Study for Stafford County Public Schools, VA; a Classification Study for Danville Public Schools, VA; a Compensation and Classification Study for Chesapeake Public Schools, VA; a Compensation Study for Botetourt County Public Schools, VA; a Facilitation of a Pay Plan Process for the York County School Division, VA; a Pay and Classification Study for Campbell County Public Schools, VA; a Superintendent's Leadership Team Compensation External Review for Fairfax County Public Schools, VA; a Classification and Compensation Study for Surry



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County Public Schools, VA; a Salary Comparability and FLSA Study for the Charleston-Kanawha Housing Authority, WV; a Classification and Compensation Study Services for the City of Westminster, MD; : Classification and Compensation Study Services for the City of Urbana, IL; a Classification and Compensation Study for Blount County, TN; a Classification Study for Jefferson Community College, NY; a Classification and/or Compensation Study for Orange County Community College, NY; a Compensation and Classification Study for SUNY Erie Community College, NY; a Compensation Plan Survey for Northwest Florida Beaches International Airport, FL; a Compensation Study for Monroe County School District, FL; a Compensation and Classification Study for the Broward County Housing Authority, FL; an Update to Salary Structure for CareerSource NE Florida; a Compensation Study for the City of Alachua, FL; a Compensation Study for the Florida Virtual School; a Compensation Study for the Town of Lady Lake, FL; a Job Classification and Compensation Study for the City of Parkland, FL; a Pay and Classification Study for the Florida Keys Aqueduct Authority, FL; a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, FL; a Pay and Classification Study for the Town of Lake Park, FL; a Performance Audit for the Lee County School District, FL; a Performance Audit for the Martin County School District, FL; a Salary Study for the City of Holmes Beach, FL; a Classification, Compensation, and Benefits Study for the Village of Pinecrest, FL; a Pay and Compensation Study for the Town of Belleair, FL; FLSA Audits for the Southwest Florida Water Management District, FL; a Pay and Classification Study for the Peace River Manasota Regional Water Supply District, FL; a Compensation and Benefits Study for Cherokee County, GA; a Compensation and Classification Study and Analysis for the City of Dublin, GA; a Pay and Classification Study for the City of Fayetteville, GA; a Classification and Compensation Study and Analysis for Effingham County, GA; a Compensation and Pay Classification Plan Study for the City of Foley, AL; a Classification, Compensation, and Benefits Study for the Chambers County Commission, AL; and a Compensation and Classification Study for Dothan City Schools, AL.

Mr. Brackins has a Master's Degree in Public Administration from Florida State University and Bachelor of Art's Degree in Business Administration from the University of Florida.



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



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*Section 3.0*  
*Summary of Proposer's Fee Statement*



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## 3.0 *Summary of Proposer's Fee Statement*

Evergreen Solutions, LLC is pleased to present our proposed fee to conduct a Compensation and Pay Classification Plan Study for the Raytown C-2 School District. We are committed to providing the highest quality consulting services to our client partners for a reasonable price. Our firm is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed fee to complete all tasks identified in our detailed work plan in **Section 4** of our proposal is **\$48,500**. Our fee is all inclusive, and includes travel costs (meals and lodging), transportation, fringe benefits, indirect costs (overhead), clerical support, and all other out-of-pocket expenses. Our fee is based on two onsite visits to the District to provide the requested services as most, if not all, of the work can be done virtually. **Note:** For any work outside of the scope of work that the District desires to have performed, Evergreen would charge a fee of \$150 per hour plus any necessary travel expenses.

Our preferred payment schedule is as follows:

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

**We are willing to negotiate the time, scope, and cost of the basic tasks, or any other options that the Raytown C-2 School District wishes to identify.** Evergreen Solutions federal employer identification number is 20-1833438.



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*Section 4.0*  
*Project Time Schedule*





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# 4.0 Project Time Schedule

In this section we include our approach and methodology for conducting the study; a detailed work plan—identifying the tasks, activities, and milestones necessary to accomplish the deliverables included in the scope of services of the Request for Proposals; and a proposed schedule for completing the study.

## 4.1 Approach and Methodology

Evergreen Solutions is uniquely qualified to conduct a Compensation and Pay Classification Plan Study for the Raytown C-2 School District (District) as our team includes recognized experts in K-12 human resources management and understands that there is not a “one size fits all” solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations. Specifically, we have developed a methodology that:

- focuses on market competitiveness;
- is based on the organization’s compensation philosophy;
- recognizes that compensation is comprised of more than just base pay levels;
- reflects changes in recent compensation strategies;
- designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and
- produces a structure that improves the organization’s ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

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

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management.



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Progressive organizations now recognize that to effectively recruit, reward, motivate, and retain employees, compensation management requires strategic thinking and planning. Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

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

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

### **Kick Off Meeting**

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

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

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

### **Communication Plan**

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

### **Employee Orientation and Focus Groups**

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



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**Department Head Interviews**

We have found that employee orientation sessions and focus groups are critical venues for building employee participation and buy-in. Since they take place at the outset of the project, they are a critical introduction to the project and the question and answer formats allow employees to become engaged in the process. During these sessions, Evergreen's consultants can also help to manage expectations since some employees may have unrealistic expectations based on anecdotal information.

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

**Job Assessment Tool and Management Issue Tool**

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

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

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

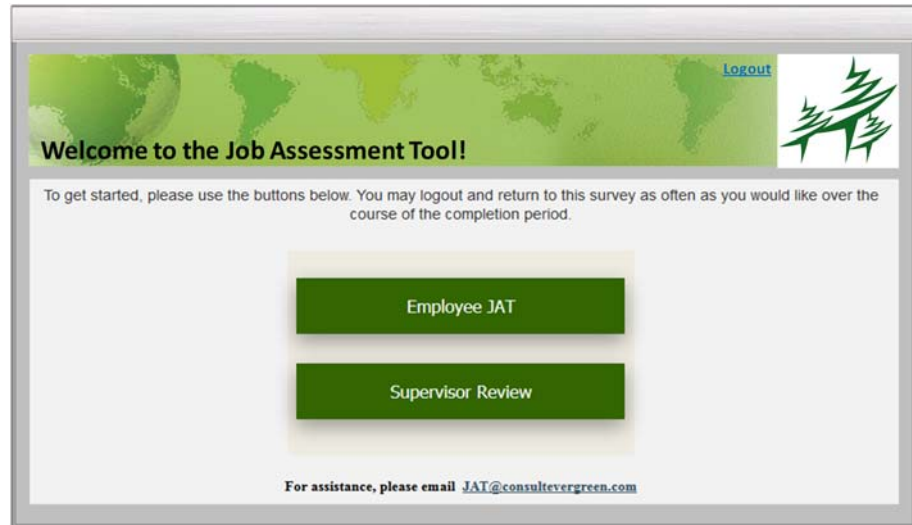
Evergreen will contact the client's Project Manager should there be a need to clarify question responses or issues with information collected from the JAT. Due to budgetary constraints faced by many of our clients, we have designed the JAT as a web-based tool so that data can be collected electronically.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

**Exhibit 4-1** below depicts a screenshot of the JAT home screen showing the levels of access for a Supervisor. Supervisors have access to their own surveys in addition to the ability to review and approve the surveys of their direct reports. The supervisor review process ensures validation of the JAT data collected from employees and prevents comments made by employees from being taken out of context.



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**Exhibit 4-1**  
**Supervisor's JAT Home Screen**



Source: Evergreen Solutions, 2020

**Exhibit 4-2** illustrates how Evergreen uses the JAT to collect functional details of employee's jobs. Seeking to understand how employees summarize their responsibilities in their own words allows our analysis to expand beyond what may be conveyed in a traditional job description. An informal survey of public sector employees revealed that 90 percent felt that the job descriptions held on file with their employers were inaccurate or incomplete representations of their duties. Understanding this, Evergreen designed the JAT to fill in those gaps to ensure that the entirety of an employee's job is analyzed within the context of the study.



**Exhibit 4-2**  
**Job Description and Responsibilities**

The screenshot shows a web form titled "Basic Job-Related Information" with a "Logout" link and a logo in the top right. The form is divided into several sections:

- Job Introduction:** A text box for a brief overview of the job.
- Type of Work:** A section with radio buttons for selecting the level of work: Clerical/Manual, Laborer/Trade-Based Occupations, Technical/Paraprofessional, Administrator, Managerial/Professional, and Executive/Advanced Professional.
- Education and Experience:** Two dropdown menus for selecting the required education and experience levels.
- Licenses and Certifications:** A text box for listing any licenses or certifications.

A green "SAVE" button is located at the bottom of the form.

Source: Evergreen Solutions, 2020

**Exhibit 4-3** shows a similar page in which employees are asked to list the Essential Functions of their job. These are the tasks and activities that define the classification and make it unique. Gathering information such as this allows Evergreen to assess the validity of the present classification structure and identify classifications or individuals within classifications that need to be restructured or reclassified.



**Exhibit 4-3  
Job Functions**

Logout

### Essential Job Functions

On the lines provided, please include all essential job functions you perform. For every function you list, estimate the total percent of your time spent on each function on an annual basis and check off which tasks are a priority. A priority task is one that is core to your position.

Task	Percent	Priority
Task 1	500	<input type="checkbox"/>
Task 2	500	<input type="checkbox"/>
Task 3	500	<input type="checkbox"/>
Task 4	500	<input type="checkbox"/>
Task 5	500	<input type="checkbox"/>
Task 6	500	<input type="checkbox"/>
Task 7	500	<input type="checkbox"/>
Task 8	500	<input type="checkbox"/>
Task 9	500	<input type="checkbox"/>
Task 10	500	<input type="checkbox"/>

Source: Evergreen Solutions, 2020

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

**Preliminary Assessment**

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



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	<p>compression, and range anomalies. The issues we identify in the assessment become core considerations in creating the potential solutions later in the process.</p>
<b>Job Evaluation</b>	<p>The next step in the process is to review responses to the JATs and identify any possible misclassifications. Once the review of the JATs has been completed, Evergreen’s consultants will evaluate all jobs on each of the compensatory factors, score each position, and determine if there is any need for further investigation of specific positions. If serious discrepancies exist, Evergreen’s consultants will work directly with the Client Project Manager to resolve any issues.</p> <p>Once work has been properly classified, changes in the current classification system rankings can be recommended. Our goal is to produce a classification system that reflects the internal equity relationships suggested by the JAT scoring conducted earlier.</p>
<b>Compensation</b>	<p>Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.</p> <p>The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization’s compensation philosophy.</p>
<b>Market Survey</b>	<p>A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen’s consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.</p>
<b>Benchmarks</b>	<p>One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client’s needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all</p>





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

**Targets**

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

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

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

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

**Unifying the Solution**

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

The Evergreen Team has considerable experience in developing multiple solutions and working with client partners to determine the one that best meets their needs. Our analytical team uses a variety of tools to produce various potential solutions: regression analysis, market thresholds, and other human resource models. Several major options are presented to the client's team before the implementation plan is created.



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**Compensation  
Administration  
Guidelines**

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

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

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

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

**System  
Maintenance**

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

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

**Exhibit 4-4** displays the interface from **JobForce Manager** for determining a positions pay grade; additional features include a job scoring tabulation sheet, market survey results database and summary report, pay plan report,



and employee salary calculators for modeling fiscal impacts of compensation changes at the employee level. All data and reports are downloadable and printable, so they can be provided to key decision makers.

**Exhibit 4-4  
JobForce Manager Tool**

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

Source: Evergreen Solutions, 2020

## 4.2 Detailed Work Plan

The detailed work plan that Evergreen proposes to use to conduct the Compensation and Pay Classification Plan Study for the Raytown C-2 School District (District) is provided in this section. Evergreen understands that the District 1,340 full- and 154 part-time employees who will be included in the study.



**Task 1.0  
Project Initiation**

Our work plan consists of the following 11 work tasks:

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

**TASK GOALS**

- Finalize the project plan with the District.
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final time line for all project milestones and deliverables.

**TASK ACTIVITIES**

- 1.1 Discuss with the District’s Project Manager and the District’s administrative officials the following objectives:
- the classification and pay plan study process;
  - understand mission and current compensation philosophy;
  - review our proposed methodology, approach, and project work plan to identify any necessary revisions;
  - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
  - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of the District and some of the short- and long-term priorities. This activity serves as the basis for assessing where



**Task 2.0  
Evaluate the  
Current System**

the District is going and what type of pay plan will reinforce current and future goals.

- 1.3 Obtain relevant materials from the District, including:
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
  - organizational charts for the departments and divisions, along with related responsibility descriptions;
  - current position and classification descriptions, salary schedule(s), and classification system; and
  - personnel policies and procedures, including step placement policies.
- 1.4 Review and edit the project work plan and submit a timeline for the completion of each project task.
- 1.5 Provide the District's Project Manager with status reports throughout the study.
- 1.6 Submit an Action Plan to the District, for accomplishing tasks associated with the study.

**KEY PROJECT MILESTONES**

- Comprehensive project management plan
- Comprehensive database of District staff.
- Action plan

**TASK GOAL**

- Conduct a comprehensive preliminary evaluation of the existing compensation plan(s) for the District.

**TASK ACTIVITIES**

- 2.1 Obtain the existing pay structure and compensation philosophy (if any). Review the existing pay structure and look for potential problems and issues to be resolved.
- 2.2 Determine the strengths and weaknesses of the current salary schedules for the District. Review compensation policies and procedures.



**Task 3.0  
Collect and Review  
Current  
Environment Data**

- 2.3 Address any pay compression issues that may exist and discuss possible solutions.
- 2.4 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.

**KEY PROJECT MILESTONES**

- Review of existing compensation plan(s)
- Pay compression issues and solutions
- Assessment of current conditions

**TASK GOALS**

- Conduct statistical and anecdotal research into the current environment within the District.
- Guide subsequent analytical tasks.

**TASK ACTIVITIES**

- 3.1 Schedule and conduct employee orientation sessions to describe the scope of work and methodology.
- 3.2 Interview managers/supervisors to obtain relevant information and statistical/anecdotal data on specific compensation issues and policies. Obtain insight into perceived current compensation system strengths and weaknesses.
- 3.3 Hold focus groups with a sample of employees to obtain additional relevant information and statistical/anecdotal data on specific compensation issues and policies.
- 3.4 Work with the District's Project Manager to administer the Job Assessment Tool (JAT) and Management Issues Tool (MIT). Our staff utilizes a web-based tool for data collection. Paper copies can be provided for classifications without computers or Internet access.
- 3.5 Review any data provided by the District that may provide additional relevant insight.

**Note:** Evergreen can perform Task 3 virtually by collecting data from employees through electronic, and/or telephonic means should the District prefer this method due to COVID19.



**Task 4.0  
Evaluate and Build  
Projected  
Classification Plan**

**KEY PROJECT MILESTONES**

- JAT and MIT distribution
- Manager/supervisor interviews
- Employee focus groups and orientation sessions

**TASK GOALS**

- Identify the classification of existing positions utilizing Evergreen's job evaluation system.
- Review JAT responses.
- Characterize internal equity relationships within the District.

**TASK ACTIVITIES**

- 4.1 Review all draft class specifications with the District's Project Manager.
- 4.2 Review the work performed by each classification and score. Include an evaluation of supervisory comments.
- 4.3 Review JAT scores and identify the classification of positions.
- 4.4 Schedule and conduct additional follow up with employees for jobs where uncertainty exists over data obtained from the JATs.
- 4.5 Develop preliminary recommendations for the classification structure and discuss with the District's Project Manager. The classification system designed at this point would be based solely on internal equity relationships and would be guided by the JAT scores for each classification. Essentially, a structure of classifications would be established, and classifications with similar scoring would be grouped and spacing between jobs would be determined.
- 4.6 Review recommendations with the District's Project Manager.

**KEY PROJECT MILESTONES**

- JAT scores by class
- Recommended classification changes
- Preliminary job structure based on internal equity





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

**TASK GOALS**

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

**TASK ACTIVITIES**

- 5.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will work with the District's Project Manager to select up to 80 classifications from the four employee groups to use as benchmarks for the salary survey.
- 5.2 Finalize the list of positions with the District's Project Manager.
- 5.3 For each employee group review with the District's Project Manager peer organizations to use as targets for the salary survey. **Note:** Evergreen will work with the District's Project Manager to select up to 20 targets for the salary survey.
- 5.4 Develop a preliminary list of public and private organizations for the external labor market survey of salary, placing a comparative emphasis on characteristics such as:
- size of the organization;
  - geographic proximity to the Raytown area;
  - economic and budget characteristics; and
  - other demographic data.
- 5.5 Develop a list of survey targets by employee group. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
- 5.6 Review survey methodology with the District's Project Manager and refine survey methodology prior to distribution of survey.
- 5.7 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

**KEY PROJECT MILESTONES**

- Final list of benchmark positions for the external labor market assessment salary survey
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts



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

**TASK GOALS**

- Conduct the external labor market salary survey.
- Provide a summary of the market salary survey results to the District's Project Manager.

**TASK ACTIVITIES**

- 6.1 Prepare a customized external labor market salary survey for the District Project Manager's approval. Discuss questions and categories for the market salary survey.
- 6.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 6.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 6.4 Collect and enter survey results into Evergreen's electronic data analysis tools.
- 6.5 Validate all data submitted.
- 6.6 Develop summary report of external labor market salary assessment results.
- 6.7 Submit summary report of external labor market salary assessment results to the District's Project Manager.

**KEY PROJECT MILESTONES**

- Market survey instrument
- Summary report of external labor market salary survey assessment results

**Task 7.0  
Develop Strategic  
Positioning  
Recommendations**

**TASK GOALS**

- Assess the appropriateness of the current compensation philosophy for the District.
- Develop a plan for select employees, providing issue areas and preliminary recommendations for strategic improvement.



**Task 8.0  
Conduct Solution  
Analysis**

**TASK ACTIVITIES**

- 7.1 Identify the compensation philosophy and accompanying thresholds.
- 7.2 Using the market salary survey data collected in **Task 6.0**, and the classification data reviewed in **Task 4.0**, recommend the appropriate salary schedules/pay plan(s) for the District.
- 7.3 Identify highly competitive positions within the District and customize recommendations for compensation where required.
- 7.4 Produce a pay plan for the District that meets its needs from an internal and external equity standpoint.
- 7.5 Recommend compensation policies and procedures with consideration for short and long-term goals.

**KEY PROJECT MILESTONES**

- Proposed compensation strategic direction, taking into account internal and external equity
- Plan for addressing unique, highly competitive positions

**TASK GOALS**

- Conduct analysis comparing JAT values.
- Survey results for the benchmark positions.
- Produce several possible solutions for implementation.

**TASK ACTIVITIES**

- 8.1 Conduct regression analysis or other appropriate techniques to properly slot each classification into the proposed pay plan for the District.
- 8.2 Place all classifications into pay grades based on **Task Activity 8.1**. Sort alphabetically by job class title, in descending order by range, and by old class title and new class specifications.
- 8.3 Create implementation solutions for consideration that take into account the current position of the District as well as the findings from the classification and compensation analysis. Identify and prepare a range of compensation policy alternatives.
- 8.4 Meet with the District's Project Manager to discuss the potential solutions.



**Task 9.0  
Develop and  
Submit Draft and  
Final Reports**

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

8.6 Document the accepted solution.

**KEY PROJECT MILESTONES**

- Initial regression analysis
- Potential solutions
- Documented final solution

**TASK GOALS**

- Develop and submit a draft and Final Report of the Compensation and Pay Classification Plan Study to the Raytown C-2 School District.
- Present the Final Report.

**TASK ACTIVITIES**

9.1 Produce a comprehensive draft report that captures the results of each previous step and provide to the District's Project Manager for review. The draft report will include an estimate of the cost to install the recommended pay plan and will recommend a methodology for implementation.

9.2 Make edits and submit necessary copies of the Final Report to the District's Project Manager.

9.3 Present the Final Report to the District's Project Manager, Superintendent's Leadership Team, Rayteam (i.e., Meet and Confer Committee), and the Board of Education, if requested.

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

9.5 Develop a plan for maintaining recommendations over time.

**KEY PROJECT MILESTONES**

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database



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**Task 10.0  
Develop  
Recommendations  
for Compensation  
Administration**

**TASK GOALS**

- Develop recommendations for continued administration by District staff to sustain the recommended compensation and classification system.
- Conduct training.

**TASK ACTIVITIES**

- 10.1 Develop recommendations and guidelines for continued administration and maintenance of the classification and compensation system by District staff, including recommendations and guidelines related to:
- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
  - how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
  - the proper mix of pay and benefits;
  - how often to adjust pay scales and survey the market;
  - the timing of implementation; and
  - how to keep the system fair and competitive over time.
- 10.2 Recommend recruitment/retention strategies, where appropriate.
- 10.3 Present recommendations to the District's Project Manager for review.
- 10.4 Finalize recommendations.
- 10.5 Provide training and tools to Human Resources Department staff to ensure that staff can conduct audits/adjustments consistent with study methods until the next formal study is conducted using Evergreen's **JobForce Manager** tool that will enable Human Resources staff to estimate future pay plan changes, update market information, make determinations on reclassifications, and create new jobs – allowing for streamlining, and an increase in fairness and transparency of regular compensation and classification tasks after solution implementation.

**KEY PROJECT MILESTONES**

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies
- Training on Evergreen's **JobForce Manager** tool



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**Task 11.0  
Provide Revised  
Class Descriptions  
and FLSA  
Determinations**

**TASK GOALS**

- Update existing class descriptions.
- Create new class descriptions as needed, ensuring ADA, FLSA, EEO, etc. requirement satisfaction.
- Provide final version of all class descriptions/specifications in electronic format (i.e., MS Word).

**TASK ACTIVITIES**

- 11.1 Assess current class descriptions for form, content, validity, and ADA, FLSA, EEO compliance, etc.
- 11.2 Discuss new class description format with the District's Project Manager.
- 11.3 Revise classification descriptions based on data gathered from the JAT process.
- 11.4 Create new class descriptions for new classifications, as needed. Provide complete listing of the allocation of job classes to salary range assignments.
- 11.5 Make FLSA determinations based on work performed and federal requirements.
- 11.6 Recommend a systematic, regular process for reviewing job descriptions.
- 11.7 Develop and recommend a procedure for employee classification appeals.

**KEY PROJECT MILESTONES**

- Updated class descriptions
- New class descriptions, as needed
- FLSA Determinations

**4.3  
Proposed Time  
Schedule**

Evergreen possesses the ability, staff, skills, and tools to conduct the Compensation and Pay Classification Plan Study for the Raytown C-2 School District in four months of the project start date and following the signing of the contract. This is based on a tentative start date of April 15, 2021, and a completion date of August 15, 2021. This proposed timeline can be modified in any way to best meet the needs of the Raytown C-2 School District.



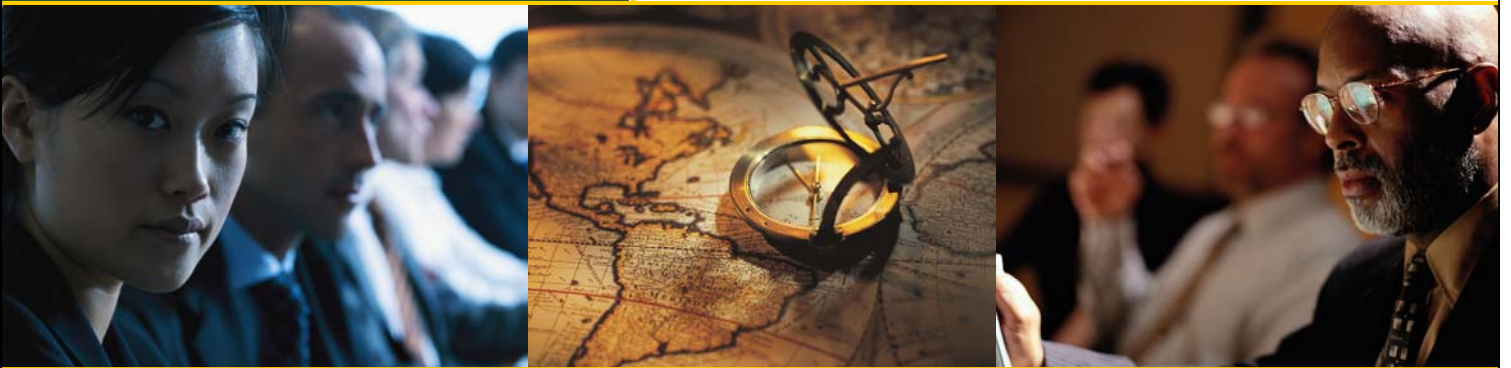
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*Appendix:  
Sample Final Report and Resumes*



# Administrative Compensation and Classification Study for Liberty Public School District #53

## FINAL REPORT



Evergreen Solutions, LLC

May 24, 2017



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## Chapter 1 – Introduction

In December 2016, Evergreen Solutions was retained by the Liberty Public School District #53 to conduct an Administrative Compensation and Classification Study for the District. This compensation and classification study was primarily designed to focus on internal and external equity of both the structure by which administrators are compensated as well as the way positions relate and compare to one another across the District.

Internal equity relates to the fairness of an organization's compensation practices among its current administrators. Specifically, by reviewing the skills, capabilities, and duties of each position, it can be determined whether similar positions are being compensated in a similar manner within the organization. The classification component of this study is aimed at resolving any inconsistencies related to job requirements and providing some clarity to the plan in place.

External equity deals with the differences between what an organization's classifications are valued and what compensation is available in the market place for the same skills, capabilities, and duties.

As part of the study, Evergreen Solutions was tasked with:

- collecting and reviewing current environmental data present for administrators in the Liberty Public School District #53;
- reviewing administrators job descriptions and obtaining job analysis questionnaires from administrators;
- reviewing administrator stipends;
- conducting salary and benefits surveys, and providing feedback to the Liberty Public School District #53 regarding current market competitiveness;
- conducting a classification analysis to assess internal equity and the efficiency of the current classification plan for administrators;
- developing strategic positioning recommendations using market data and best practices;
- developing an administrator compensation structure and implementation cost plan for the Liberty Public School District #53; and
- developing and submitting draft and final reports summarizing findings and recommendations.



## 1.1 STUDY METHODOLOGY

Evergreen combined qualitative as well as quantitative data analysis to produce an equitable solution in order to maximize the fairness and competitiveness of the District’s compensation structure and practices for administrators.

Project activities included:

- conducting a project kick-off meeting;
- conducting an orientation session with administrators;
- facilitating focus group sessions on January 11 and 12, 2017;
- conducting the salary survey;
- developing recommendations for compensation management;
- developing detailed implementation plans; and
- creating the draft and final reports.

### **Kickoff Meeting**

The kickoff meeting provided an opportunity to discuss the study, finalize the work plan, and begin the data collection process. Data collection of relevant background material (including existing pay plans, organization charts, policies, procedures, training materials, job descriptions, and other pertinent materials) is part of this process.

### **Outreach to Administrators**

Administrator outreach consisted of an orientation session and focus group meetings. The orientation session provided an opportunity for administrators and supervisors to learn more information about the purpose of the study, and receive specific information related to their participation in the study process—especially the use of the Job Assessment Tool (JAT). The focus group sessions allowed administrators, supervisors, and senior management to identify practices that are working well and to suggest areas for improvement with regard to compensation and classification. The collective feedback received during these sessions is summarized in **Chapter 2** of this report.

### **Classification Analysis**

To perform an analysis of the classification systems, all administrators were asked to complete a JAT in which they have the opportunity to describe the work they performed in their own words. Supervisors then reviewed the administrator JATs and provide additional information as needed. The information provided in the completed JATs was then used in the classification analysis in two ways:

- First, the work described was reviewed to ensure that classification titles were appropriate.
- Second, the JATs were evaluated to quantify, through a scoring methodology, each classification relative value within the District.



Each classification's score is based on the administrator and supervisor responses to the JAT. The scores allowed for a comparison of classifications across the District.

### **Analysis of Current Conditions**

This analysis provided an overall assessment of the existing pay plans and related administrator data at the time the study began. The existing pay plans, the progression of administrator salaries through pay grades, administrator tenure, and the distribution of administrators in the District were all examined during this process. The findings of this analysis is summarized in **Chapter 3** of this report.

### **Market Analysis**

The external market is defined as identified peers that have similar characteristics, demographics, and service offerings as the target organization. Benchmark positions were identified from each area and level of the administrative organization and included a large cross-section of positions in the District. Once the target and benchmark information is finalized, a survey tool was created to solicit salary information from each of the peer districts. When the results were received, the data are analyzed, cleaned, and entered to provide aggregate findings. The results of the salary survey are provided in **Chapter 4**.

### **Recommendations**

During the recommendation phase of the study, Evergreen Solutions developed a market-based pay plan and slotted classifications into the plan based on internal and external equity. Next, implementation options were developed to transition administrator salaries into the new pay plans, and the associated costs of adjusting administrator salaries were estimated.

Information was then provided to the Liberty Public School District #53 on how to execute the recommended salary adjustments, as well as how to maintain the recommended compensation and classification system over time. A summary of the findings of the study and the associated recommendations can be found in **Chapter 5**.

## **1.2 REPORT ORGANIZATION**

This report includes the following five chapters:

- Chapter 1 – Introduction
- Chapter 2 – Summary of Administrator Outreach
- Chapter 3 - Assessment of Current Conditions
- Chapter 4 – Market Survey Summary
- Chapter 5 – Recommendations



## Chapter 2 – Summary of Employee Outreach

Evergreen visited the Liberty Public School District #53 on January 11 and 12, 2017 to conduct outreach sessions. These sessions consisted of an orientation presentation and focus groups with administrative employees. The orientation segment gave administrators an opportunity to learn about the study process and about their role in the study. During the focus group segment, Evergreen asked questions designed to gather feedback on several topics related to the study. This feedback provided the Evergreen Team with valuable knowledge of administrator opinions on the District's current compensation and classification system.

The Evergreen Team held the orientation session on January 11, 2017. The orientation session included a brief overview of the study and a detailed walk-through of the Job Assessment Tool (JAT) process—which all central office and school administrators were asked to complete on-line. In addition, the orientation session was taped and placed on the District's website.

All administrators were invited to participate in focus groups. About 60 administrators attended one of 10 focus group sessions held over a two-day period. The objective of the focus groups was to collect feedback on strengths and weaknesses of the District's current compensation and classification plan directly from the administrators. Focus groups, like the orientation session, lasted for approximately 45-50 minutes.

The remainder of this chapter summarizes the comments made by focus group participants. **It is important to note that the views shared in this summary are administrator perceptions and are not necessarily supported by Evergreen Solutions nor the Liberty Public School District #53.** Evergreen, however, used this information as a basis for further investigation throughout the course of the study. In all instances, Evergreen has removed any information that may identify the commenter.

Comments and feedback have been organized into the following four sections:

- 2.1 General Feedback
- 2.2 Compensation
- 2.3 Classification
- 2.4 Summary



## 2.1 GENERAL FEEDBACK

Although the purpose of the focus group sessions was to discuss compensation and classification, the first two questions solicited feedback related to issues beyond these two topics. In some cases, even questions related specifically to compensation and classification yielded feedback outside of these domains. This section provides feedback received unrelated to compensation and classification, per se, but important to framing the context in which this study is occurring.

Important factors frequently shared by administrators as reasons for coming to work for and/or remaining with the District included:

- **Reputation for Academic Excellence** – Many administrators said they are proud to work for the District because it has a positive reputation in the area for academic excellence. They are excited to tell their families and friends that they work for Liberty Public School District #53.
- **Team Atmosphere and Culture** – Teamwork, caring, and supportive co-workers were repeatedly cited as primary reasons for many administrators to remain in the District. Employees said that they felt that their team “had their backs.” Administrators described the culture as one of cooperation and sharing where staff get along with each other.
- **Quality of Staff** – Administrators praised the employees with whom they work as dedicated and having a sense of pride and self-satisfaction.
- **Home Town** – A number of administrators indicated that they went to school in the Kansas City area and either remained here or came back to the area after college because this was their home. Others said they returned home after working in other areas of the state or country—a job in the school district became available and provided them an opportunity to come home and be near their families. Still others said they came to the area for various reasons, fell in love with the area and to them this is now home; they have no intention of leaving the District.
- **Opportunities for Advancement** – Several administrators noted that they came to Liberty because the District had opportunities to advance within the system. Being able to continually gain experience in a creative and innovative setting also provided significant job satisfaction.
- **Leadership** – Participants indicated that they are pleased with the District leadership—although there has been some turnover.
- **Promoting from Within** – Among school administrators, there is a general perception that LPSD is adverse to promoting employees who already work in the District. Many recent employees have come from outside the District.



## 2.2 COMPENSATION

Specific issues shared by central office and school administrators related to compensation practices included the following:

- **Pay Progression** – Participants noted that the lack of pay increases over the last several years has been frustrating and has caused compression issues. For most recent years, there has only been a 1 to 1.5 percent annual salary adjustment for administrators.
- **Internal Equity** - Internal morale is negatively impacted when new hires are paid at a higher level than incumbent administrators; current salaries of some incumbents are not at a competitive level. According to administrators, this is compounded by the fact that some LPSD principals new to their positions are paid at a higher level than experienced principals.
- **Assistant Principal Compensation** – Focus group participants shared that assistant principal pay, in particular, is very low; with some adding that assistant principals sometimes end up making less than what they made as teachers.
- **Doctorate Stipend** – Many administrators stated there is very little incentive to achieve a doctorate degree because the additional compensation is very low.
- **Stipends** – Three types of stipends are available for administrators: travel, longevity, and education. Administrators indicate that there should be more stipends afforded to them for extra duties.
- **Other School Districts** – Many administrators stated that their peers in other school districts get both annual row/step and COLA increases, but not employees in LPSD. Therefore, in many cases, LPSD salaries are not competitive.

## 2.3 CLASSIFICATION

Participants provided Evergreen with the following concerns specific to job classification:

- **Central Office Administrators Versus School Administrators Classification** – The Director I Position in the central office is at the same classification as an Elementary Assistant Principal. At Pay Grade 9, the Director III is at same pay grade as an Elementary Principal, the Director II and High School Assistant Principals are at the same pay level (Pay Grade 8). Therefore, the upward mobility and promotional opportunities when an administrator moves from a school to the central office, in general, are not found in LPSD.

Administrators indicated that many central office administrator positions are not viewed as higher-level positions when compared to school-based administrative positions within the District. Participants noted that this discourages growth for principals, as central office positions are not attractive as far as a salary increase is



concerned. Some administrators feel central office positions should be at a higher level.

- **Directors I, II, and III** – Many believe that there is little differentiation among responsibilities of how the three levels of directors are classified. Specific positions identified for examination include the Purchasing and Distribution Services Director, Communications and Marketing Director, and the Athletics and Activities Director positions.
- **Row versus Step** – Confusion exists between these two terms on the pay scale; moreover, neither ‘row’ nor ‘step’ equates to years of experience.
- **Employees Promotions** – Administrators who have been promoted to a new pay level are oftentimes placed at Row 1—in spite of their years of experience in LPSD.
- **Reduction in Steps** – This school year, the Administrator Pay Scale was condensed from 25 to 19 years to reach maximum; many administrators in focus groups were not sure why this reduction took place.
- **Internal Adjustments** – According to some employees, central office administrators have gotten internal adjustments and salary increases, but school administrators believe that they have not received similar adjustments.
- **Range 13 and 14** – Some central office administrators stated that Assistant Superintendents and Chiefs—who are at this high range—should be removed from the pay schedule as they represent the employer.

## 2.4 SUMMARY

The administrator feedback reported above represents common issues that exist in many school districts. The feedback received by the Evergreen Team during focus groups in the District was very positive when considered as a whole. Employees believe that LPSD is a very good place to work—based on the work environment, culture, and co-workers. However, it is apparent that administrators perceive weaknesses in certain areas related to compensation and classification.

The information received during Evergreen’s onsite visit will be valuable as the study progresses. These comments and suggestions will be considered throughout the remainder of the study.





## Chapter 3 – Assessment of Current Conditions

The purpose of **Chapter 3** is to provide an overall description of the structure of Administrative compensation schedule and classification system currently being implemented in Liberty Public School District #53 (LPSD). This chapter includes:

- a salary schedule analysis;
- range placement analysis;
- quartile analysis;
- administrative experience and distribution analysis;
- classification listing of all of Administrative job titles included in the study; and
- a review of stipends.

Data included in this chapter reflect the information at the point in time in which the study commenced and should be considered a snapshot in time. The insights gained from this chapter provide the opportunity for a more detailed analysis and recommendations, but are not sufficient cause for recommendations on their own. By reviewing the LPSD compensation structure, philosophy and employee demographics, Evergreen Solutions gains a better understanding of the structures and methods in place. This information, when integrated with stakeholder and employee feedback and peer market data, is used to develop study recommendations.

### 3.1 ANALYSIS OF SALARY RANGES

**Exhibit 3A** displays the District's 2016-17 salary schedule for Administrators. As shown, the ranges are on a step-based pay plan. **Exhibit 3B** provides a simplified display of the range values at minimum, midpoint, and maximum for ease of analysis.

Based on the analysis of the salary ranges, the following observations were made:

- Range spread, set at an average of 38 percent, varies across ranges. Each range has a total of 19 steps.
- Midpoint progression, the distance between each range's midpoint and the next sequential range's midpoint averages 10.0 percent.
- Overall, there are a total of 42 classification titles and 76 employees within this salary schedule.



**EXHIBIT 3A**  
**SALARY SCHEDULE FOR ADMINISTRATIVE EMPLOYEES**  
**2016-17 SCHOOL YEAR**

Steps	Range 1	Range 2	Range 3	Range 4	Range 5	Range 6	Range 7	Range 8	Range 9	Range 10	Range 11	Range 12	Range 13	Range 14
Min	\$40,000	\$44,000	\$48,400	\$53,240	\$58,564	\$64,420	\$70,862	\$77,949	\$85,744	\$94,318	\$103,750	\$114,125	\$125,538	\$138,091
Mid	\$47,603	\$52,361	\$57,592	\$63,357	\$69,692	\$76,655	\$84,324	\$92,758	\$102,032	\$112,231	\$123,804	\$135,804	\$149,382	\$165,829
Max	\$55,205	\$60,721	\$66,783	\$73,474	\$80,819	\$88,890	\$97,785	\$107,567	\$118,321	\$130,144	\$143,161	\$157,482	\$173,225	\$193,567
Row 1	\$40,000	\$44,000	\$48,400	\$53,240	\$58,564	\$64,420	\$70,862	\$77,949	\$85,744	\$94,318	\$103,750	\$114,125	\$125,538	\$138,091
Row 2	\$40,845	\$44,929	\$49,421	\$54,364	\$59,800	\$65,779	\$72,358	\$79,594	\$87,554	\$96,308	\$105,940	\$116,534	\$128,187	\$141,173
Row 3	\$41,690	\$45,858	\$50,442	\$55,488	\$61,036	\$67,138	\$73,854	\$81,239	\$89,364	\$98,298	\$108,130	\$118,943	\$130,836	\$144,255
Row 4	\$42,535	\$46,787	\$51,463	\$56,612	\$62,272	\$68,497	\$75,350	\$82,884	\$91,174	\$100,288	\$110,320	\$121,352	\$133,485	\$147,337
Row 5	\$43,380	\$47,716	\$52,484	\$57,736	\$63,508	\$69,856	\$76,846	\$84,529	\$92,984	\$102,278	\$112,510	\$123,761	\$136,134	\$150,419
Row 6	\$44,225	\$48,645	\$53,505	\$58,860	\$64,744	\$71,215	\$78,342	\$86,174	\$94,794	\$104,268	\$114,700	\$126,170	\$138,783	\$153,501
Row 7	\$45,070	\$49,574	\$54,526	\$59,984	\$65,980	\$72,574	\$79,838	\$87,819	\$96,604	\$106,258	\$116,890	\$128,579	\$141,432	\$156,583
Row 8	\$45,915	\$50,503	\$55,547	\$61,108	\$67,216	\$73,933	\$81,334	\$89,464	\$98,414	\$108,248	\$119,080	\$130,988	\$144,081	\$159,665
Row 9	\$46,760	\$51,432	\$56,568	\$62,232	\$68,452	\$75,292	\$82,830	\$91,109	\$100,224	\$110,238	\$121,270	\$133,397	\$146,730	\$162,747
Row 10	\$47,605	\$52,361	\$57,589	\$63,356	\$69,688	\$76,651	\$84,326	\$92,754	\$102,034	\$112,228	\$123,460	\$135,806	\$149,379	\$165,829
Row 11	\$48,450	\$53,290	\$58,610	\$64,480	\$70,924	\$78,010	\$85,822	\$94,399	\$103,844	\$114,218	\$125,650	\$138,215	\$152,028	\$168,911
Row 12	\$49,295	\$54,219	\$59,631	\$65,604	\$72,160	\$79,369	\$87,318	\$96,044	\$105,654	\$116,208	\$127,840	\$140,624	\$154,677	\$171,993
Row 13	\$50,140	\$55,148	\$60,652	\$66,728	\$73,396	\$80,728	\$88,814	\$97,689	\$107,464	\$118,198	\$130,030	\$143,033	\$157,326	\$175,075
Row 14	\$50,985	\$56,077	\$61,673	\$67,852	\$74,632	\$82,087	\$90,310	\$99,334	\$109,274	\$120,188	\$132,220	\$145,442	\$159,975	\$178,157
Row 15	\$51,830	\$57,006	\$62,694	\$68,976	\$75,868	\$83,446	\$91,806	\$100,979	\$111,084	\$122,178	\$134,410	\$147,851	\$162,624	\$181,239
Row 16	\$52,675	\$57,935	\$63,715	\$70,100	\$77,104	\$84,805	\$93,302	\$102,624	\$112,894	\$124,168	\$136,600	\$150,260	\$165,273	\$184,321
Row 17	\$53,520	\$58,864	\$64,736	\$71,224	\$78,340	\$86,164	\$94,798	\$104,269	\$114,704	\$126,158	\$138,790	\$152,669	\$167,922	\$187,403
Row 18	\$54,365	\$59,793	\$65,757	\$72,348	\$79,576	\$87,523	\$96,294	\$105,914	\$116,514	\$128,148	\$140,980	\$155,078	\$170,571	\$190,485
Row 19	\$55,205	\$60,721	\$66,783	\$73,474	\$80,819	\$88,890	\$97,785	\$107,567	\$118,321	\$130,144	\$143,161	\$157,482	\$173,225	\$193,567

1: Note that some salary ranges and ranges possess duplicate classification titles.

2: Steps on the schedule do not necessarily reflect years of experience. Initial placement on the schedule is determined at the time of hire.

**EXHIBIT 3B  
SIMPLIFIED SALARY SCHEDULE FOR ADMINISTRATIVE EMPLOYEES**

Ranges	Minimum	Midpoint	Maximum	Range Spread	Midpoint Progression	Number of Employees	Number of Class Titles
Range 1	\$40,000	\$47,603	\$55,205	38%	-	0	0
Range 2	\$44,000	\$52,361	\$60,721	38%	10%	2	2
Range 3	\$48,400	\$57,592	\$66,783	38%	10%	0	0
Range 4	\$53,240	\$63,357	\$73,474	38%	10%	4	4
Range 5	\$58,564	\$69,692	\$80,819	38%	10%	1	1
Range 6	\$64,420	\$76,655	\$88,890	38%	10%	13	5
Range 7	\$70,862	\$84,324	\$97,785	38%	10%	7	4
Range 8	\$77,949	\$92,758	\$107,567	38%	10%	14	8
Range 9	\$85,744	\$102,032	\$118,321	38%	10%	23	11
Range 10	\$94,318	\$112,231	\$130,144	38%	10%	4	1
Range 11	\$103,750	\$123,804	\$143,161	38%	10%	2	1
Range 12	\$114,125	\$135,804	\$157,482	38%	10%	3	1
Range 13	\$125,538	\$149,382	\$173,225	38%	10%	3	3
Range 14	\$138,091	\$165,829	\$193,567	40%	11%	0	1
<b>TOTAL</b>						<b>76</b>	<b>42</b>

Exhibit 3C displays all classification titles across the District's Administrative salary schedule.

**EXHIBIT 3C  
CLASSIFICATION LIST FOR ADMINISTRATIVE EMPLOYEES**

Classification Title	Classification Title
Assistant Coordinator - Kid's Zone	Director II - Safety & Security
Assistant Director - Nutrition Services	Director II - Transportation
Assistant Director - Transportation	Director III - Alternative Education
Assistant Principal - Elementary	Director III - Athletics & Activities
Assistant Principal - High School	Director III - Communications & Marketing
Assistant Principal - Middle School	Director III - Curriculum
Assistant Superintendent	Director III - Fine Arts
Chief Financial Officer	Director III - Human Resources
Chief Operations Officer	Director III - Special Services
Coordinator I - Kids Zone	Director III - Student Services
Coordinator of Nutrition & Culinary Services	Director III - Technology
Coordinator of Nutrition Services Operations	Director I-Library Media
Custodial-District Level Supervisor	Director of College/Career Readiness & Community Partnerships
Deputy Superintendent	Energy Conservation Manager
Director I - Human Resources Operations	Executive Director (Admin)
Director I - Purchasing & Distribution	Manager I - Grounds
Director II - Administrative Services	Manager III - Custodial Services
Director II - Assessment & Evaluation	Manager III - Maintenance
Director II - Data Services	Principal - Elementary
Director II - Facilities & Grounds	Principal - High School
Director II - Health Services	Principal - Middle School
Director II - Nutrition Services	



### 3.2 QUARTILE ANALYSIS

In a quartile analysis, each salary range possessing at least one full-time employee is divided into four equal segments, or quartiles, and employees are assigned a quartile based on which step they fall on. This analysis can reveal areas of compression within a compensation system when paired with experience data. Generally, the ideal outcome is for the analysis to show a strong correlation between experience and salary—especially within the same salary range—where a highly experienced employee should be at a higher salary. However, it should be noted before starting this analysis that, in the District, years of experience does not always equal the step an employee is placed on.

**Exhibit 3D** shows the number of administrators that are in each quartile of each range, as well as the average overall district experience (i.e. the years of experience each employee holds in an administrative position) by quartile. Overall, data show that 28.9 percent of administrators fall into Quartile 1 of their respective range; 34.2 percent fall into Quartile 2; 22.4 percent fall into Quartile 3; and 14.5 percent fall into Quartile 4.

**EXHIBIT 3D**  
**QUARTILE ANALYSIS FOR ADMINISTRATIVE EMPLOYEES**

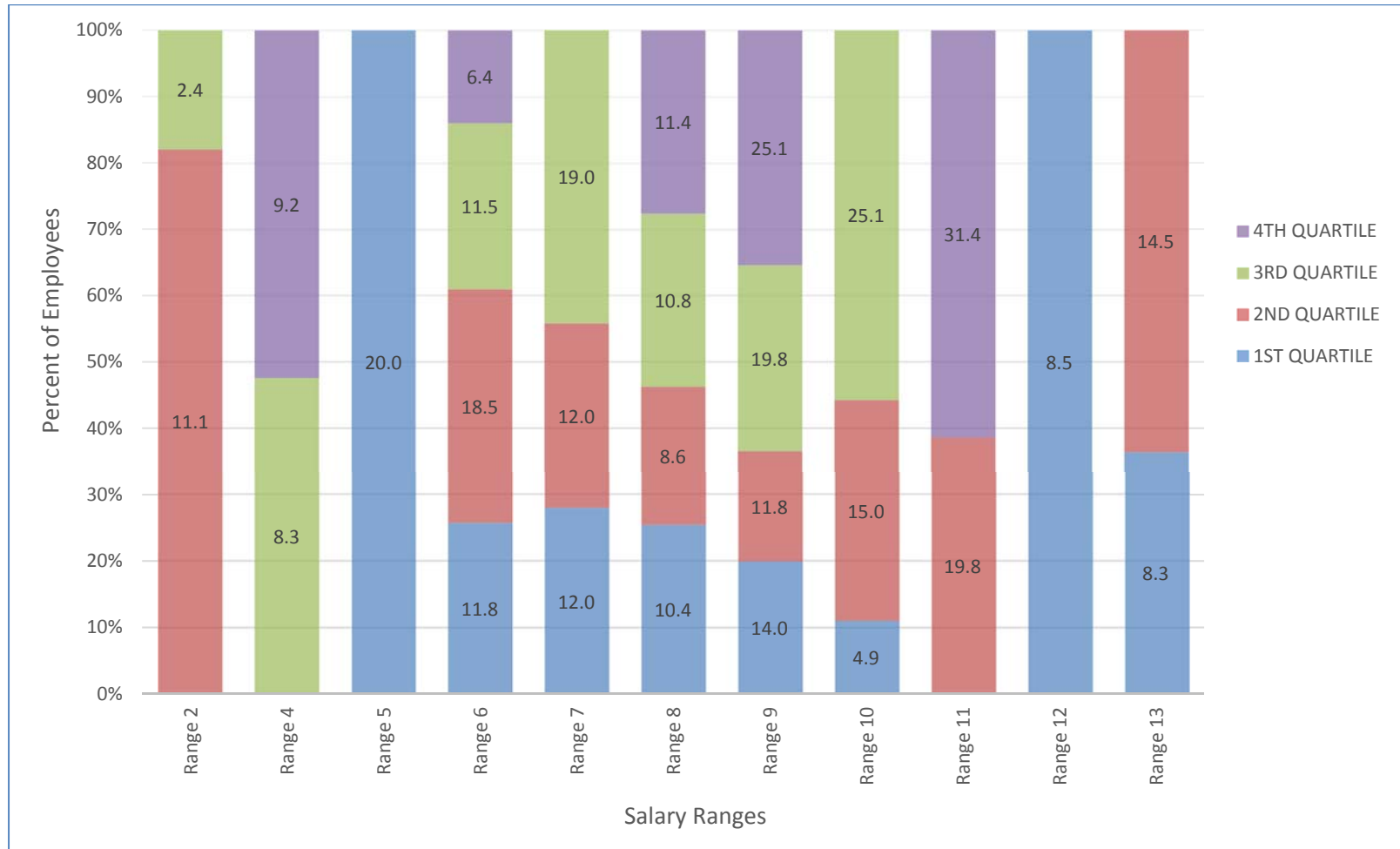
Range	Total Employees	Average Experience	1st Quartile			2nd Quartile			3rd Quartile			4th Quartile		
			#	%	Avg Exp.	#	%	Avg Exp.	#	%	Avg Exp.	#	%	Avg Exp.
Range 2	2	6.8	-	0%	-	1	50%	6.00	1	50%	3.0	-	0%	-
Range 4	4	8.8	-	0%	-	-	0%	-	2	50%	6.5	2	50%	10.5
Range 5	1	20.0	1	100%	5.0	-	0%	-	-	0%	-	-	0%	-
Range 6	13	13.2	3	23%	2.0	5	38%	7.20	4	31%	9.8	1	8%	20.0
Range 7	7	14.0	3	43%	4.3	2	29%	7.50	2	29%	11.5	-	0%	-
Range 8	14	10.3	2	14%	5.0	4	29%	6.50	4	29%	9.0	4	29%	11.8
Range 9	23	15.3	7	30%	3.4	10	43%	7.30	3	13%	10.0	3	13%	19.7
Range 10	4	15.0	1	25%	2.0	2	50%	8.50	1	25%	17.0	-	0%	-
Range 11	2	25.6	-	0%	-	1	50%	8.00	-	0%	-	1	50%	20.0
Range 12	3	8.5	3	100%	3.0	-	0%	-	-	0%	-	-	0%	-
Range 13	3	10.3	2	67%	3.5	1	33%	10.00	-	0%	-	-	0%	-
<b>Overall</b>	<b>76</b>	<b>13.4</b>	<b>22</b>	<b>28.9%</b>	<b>2.6</b>	<b>26</b>	<b>34.2%</b>	<b>5.5</b>	<b>17</b>	<b>22.4%</b>	<b>6.1</b>	<b>11</b>	<b>14.5%</b>	<b>7.4</b>

Salary ranges (1 and 14) without incumbents were omitted.

**Exhibit 3E** displays the graphical representation of the data contained in **Exhibit 3D**. In analyzing these data, it can be determined that the average administrative experience in Quartile 1 is 2.6 years; in Quartile 2 is 5.5 years; in Quartile 3 is 6.1 years; and in Quartile 4 is 7.4 years. This seems to indicate that administrators are moved through their salary ranges equitably. Ideally, average experience increases from one quartile to the next, and average experience is relatively equal for each salary range across multiple salary ranges. That is, administrators progress from one quartile to the next with similar experience regardless of salary range. Resulting recommendations from this study in **Chapter 5** provide the District with options on how this can be addressed.



### EXHIBIT 3E QUARTILE PLACEMENT AND AVERAGE EXPERIENCE BY SALARY RANGE FOR ADMINISTRATIVE EMPLOYEES



At the granular level there is evidence of possible compression, as in some salary ranges administrators with greater experience are compensated below employees with less experience. For example, in Salary Range 2, administrators in Quartile 2 have average experience of 6.0 years in the District whereas those in Quartile 3 have average experience of 3.0 years. While this anomaly is not cause for concern on its own, an explanation is needed as to why this might be the case. It should also be noted that the trend across the majority of salary ranges is otherwise that salary increases with experience.

### **3.3 ACTUAL VERSUS EXPECTED PLACEMENT**

Another helpful analysis to identify issues with an organization's compensation system is comparing actual employee salaries to expected employee salaries based on years of experience. Expected salary is based on an employee's administrative experience—where an employee with two years of experience would be expected to fall on Step 3 of their salary range. Generally, an organization seeks to maintain this relationship between years of experience and step placement—especially in a step-based compensation system. Once expected salary placement is determined for each administrator, it is compared to each administrator's actual salary to determine the variance. Then, employees are grouped into categories for ease of analysis. Expected salary is simply the step an administrator would be on based on their years of experience in a position, whereas actual salary is the step the employee is actually on.

**Exhibit 3F** displays the percentage of administrators whose actual salary varies from their expected salary by salary range. Administrators have been grouped into one of three categories for simplicity of analysis—including those whose actual salaries are below expected salary; those whose actual salaries are at expected salary; and those whose actual salaries are above expected salary.

In two of the salary ranges, more than 50.0 percent of administrators have actual salaries that are above expected salary. In Range 6, 53.8 percent of administrator actual salaries fall below expected salary.

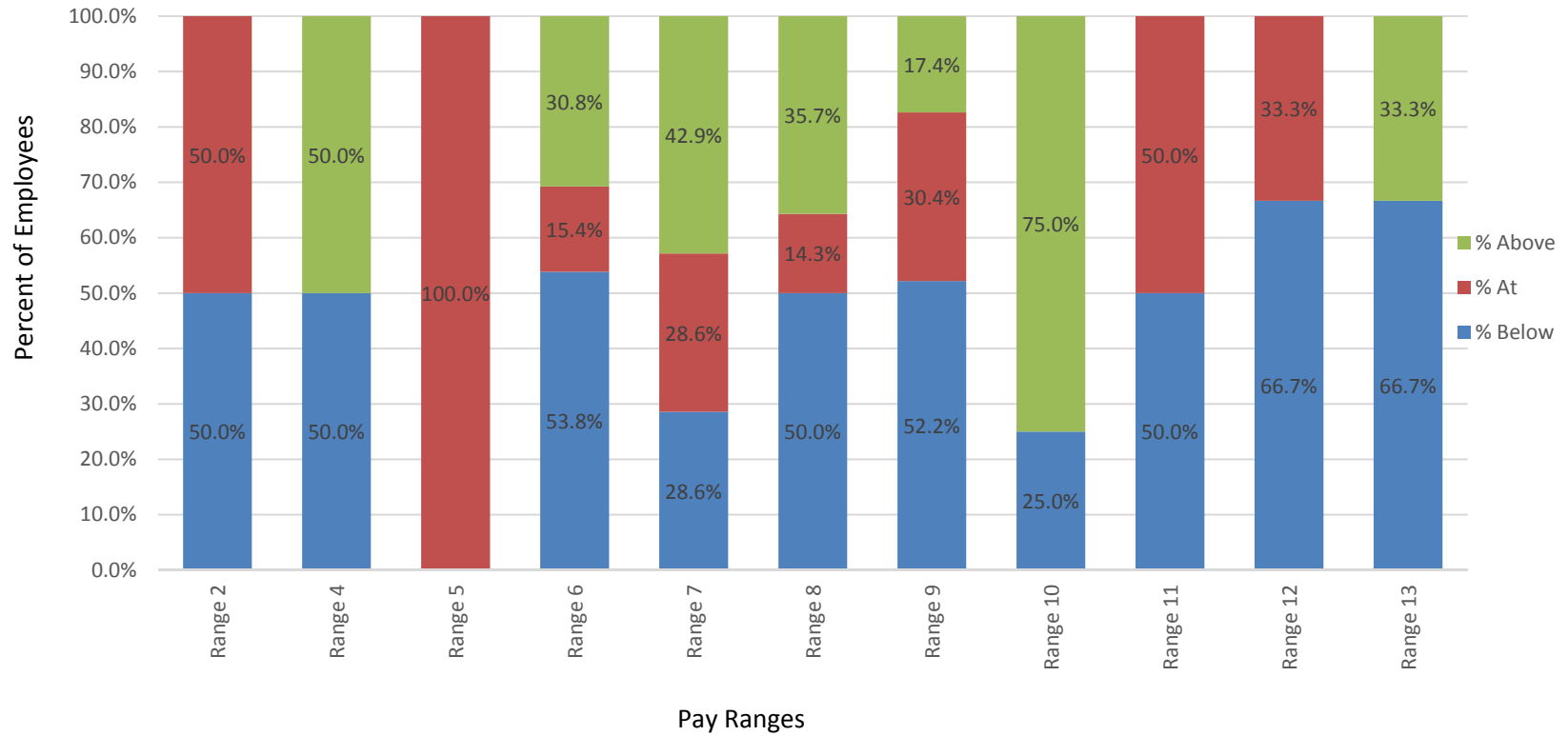
In summary, across all salary ranges:

- 44.8 percent of administrators have actual salaries below expected salary;
- 34.1 percent have actual salaries at expected salary; and
- 25.2 percent have actual salaries above expected salary based on their administrative experience.

This could indicate that years of experience in a position do not necessarily equate to step placement, and that promotional practices may lead to an employee being on a step that is higher than expected; this finding was confirmed by the District. While there is no best practice for the percentage of employees that should be below, at, or above expected salary, a large clustering of administrators below expected salary may indicate a policy issue; however, this does not appear to be the case at the LPSD.



### EXHIBIT 3F ACTUAL VERSUS EXPECTED SALARY PLACEMENT FOR ADMINISTRATIVE EMPLOYEES



### 3.4 DEPARTMENT DISTRIBUTION

As of December 2016, the District employed 76 administrators across the salary ranges in this study. The following analyses are intended to provide basic information regarding how employees are distributed among departments. **Exhibit 3G** depicts the number of classifications that are present in each department or school, along with the number and overall percentage of total employees by department or school. As **Exhibit 3G** illustrates, the largest department is the Academic Services, with nine employees, representing 11.7 percent of the District's Administrative workforce. Overall, the District has 42 unduplicated classification titles which are included in this study.

**EXHIBIT 3G**  
**ADMINISTRATIVE EMPLOYEES AND CLASSES BY DEPARTMENT/SCHOOL**

Department/School	Employees	Classes	% of Total
Academic Services/Sec Prin Appr	9	8	11.7%
Alexander Doniphan Elementary	2	2	2.6%
Custodial Office	2	2	2.6%
DAC- Administrative Services	1	1	1.3%
Discovery Middle School	2	2	2.6%
District Administration Center	2	2	2.6%
District Warehouse	1	1	1.3%
Early Childhood Center	1	1	1.3%
Epic Elementary	1	1	1.3%
Fine Arts Department	1	1	1.3%
Franklin Elementary	1	1	1.3%
Grounds-Mtn Office	1	1	1.3%
Heritage Middle School	2	2	2.6%
Human Resources Department	2	2	2.6%
Kellybrook Elementary	2	2	2.6%
Lewis & Clark Elementary	2	2	2.6%
Liberty Academy	1	1	1.3%
Liberty Kid's Zone	1	1	1.3%
Liberty Middle School	2	2	2.6%
Liberty North High School	5	3	6.5%
Liberty Oaks Elementary	2	2	2.6%
Liberty Senior High School	6	4	7.8%
Lillian Schumacher Elementary	2	2	2.6%
Maintenance Office	3	3	3.9%
Manor Hill Elementary	1	1	1.3%
Manor Hill Elementary/Franklin Elementary	1	1	1.3%
Nutrition Services	4	4	5.2%
Ridgeview Elementary	2	2	2.6%
Shoal Creek Elementary	2	2	2.6%
South Valley Middle School	2	2	2.6%
Special Ed Coordination Center	1	1	1.3%
Superintendent	5	5	6.5%
Transportation	2	2	2.6%
Warren Hills Elementary	2	2	2.6%
<b>Total</b>	<b>76</b>	<b>42</b>	<b>100.0%</b>

\*Unduplicated count.





### 3.5 STIPENDS

Supplemental pay (such as stipends and extra duty pay) represents compensation in addition to an employee's regular base salary. Supplemental pay, and especially extra duty pay, is normally authorized on a year-to-year basis. **Exhibit 3H** identifies the District's current stipends available to Administrative staff, and includes four types:

- education;
- longevity;
- travel; and
- additional duties.

#### EXHIBIT 3H DISTRICT STIPENDS FOR ADMINISTRATORS

Stipend	Amount
Education	<ul style="list-style-type: none"> <li>• Education Specialist- Base plus \$1,500</li> <li>• Doctorate Degree- Base plus \$3,000</li> </ul>
Longevity	<ul style="list-style-type: none"> <li>• 0-5 years- Base plus \$3,000</li> <li>• 6-10 years- Base plus \$4,200</li> <li>• 11-15 years- Base plus \$5,400</li> <li>• 16-20 years- Base plus \$7,800</li> <li>• Salary Ranges 13-14- Base plus \$9,900</li> </ul>
Travel	<ul style="list-style-type: none"> <li>• Varies by position - \$684, \$1,104, or \$2,400</li> </ul>
Additional Duties	<ul style="list-style-type: none"> <li>• Varies by extra responsibilities assigned</li> </ul>

It is important to note that in the Liberty Public School District, longevity pay is recognized as a special stipend for loyalty to the District and is clearly part of the District's culture.

### 3.6 CONCLUSION

The analysis contained in this chapter provides an overall description of the District's current Administrative salary schedule. The following two observations can be made:

- Range spread, set at an average of 38 percent, varying across ranges. Each range has a total of 19 steps, and the distance between each range's midpoint and the next sequential range's midpoint averages 10.0 percent. There are a total of 42 classification titles and 76 employees within this salary schedule.
- While anomalies exist in the relationship between experience and range penetration, generally the District maintains a generally healthy positive linear relationship between these two variables. Other factors, such as promotional practices, are known to skew the correlation between years of experience and step placement.



This analysis acts as a starting point for development of recommendations in subsequent chapters of this report. Paired with market data, Evergreen is able to make recommendations that will ensure that the District's compensation system is structurally sound in terms of best practice, competitive with the market, and treats administrators equitably moving forward.



## Chapter 4 – Market Summary

**Chapter 4** contains a market analysis in which the Liberty Public School District, MO salary ranges are compared to select peer school districts. Market comparisons provide key information regarding an organization’s competitive position. It is important to note that the comparison of District salary ranges the market does not translate well at the individual employee level. This is because a market range simply provides the thresholds within which an employee’s salary should be placed, versus providing any information on where specifically in the range an employee’s salary should lay. Employee salary placement in the range is typically determined based on a multitude of variables, such as the incumbent’s education level, prior experience, and even the individual’s ability to negotiate.

The salary survey focused on the average salary ranges offered by the market for 30 of LPSD administrative-level classifications. This external equity analysis allowed for a comprehensive examination of the administrative compensation structure. Market comparison analysis is best thought of as a snapshot of current conditions, and provides the most up-to-date market information available at the time. In other words, market conditions will generally change over time and, in some cases, will change very quickly. Therefore, a market survey and analysis should be performed at regular intervals to help maintain market competitiveness.

Collaboratively, Evergreen and the District considered several factors when selecting peer school districts for comparison, including geographic proximity, enrollment size, and the relative population size being served by the local education agency. Evergreen solicited and obtained full or partial market data from the following 16 peer school districts:

- Blue Springs, MO
- Columbia, MO
- Francis Howell, MO
- Hickman Mills, MO
- Independence, MO
- Jefferson City, MO
- Kansas City, MO
- Lee’s Summit, MO
- North Kansas City, MO
- Park Hill, MO
- Parkway, MO
- Rockwood, MO
- St. Louis, MO
- Blue Valley, KS
- Olathe, KS
- Shawnee Mission, KS

School districts in St. Louis and Columbia, MO were unable to provide a full response; however, Evergreen was able to obtain some information from their websites. In addition to the 16 respondents, two school districts declined to participate—Fort Zumwalt, MO and Wentzville, MO. From the participating peers, a total of 425 (including average actual responses) data points were collected for comparative purposes.



All data collected were adjusted for cost of living using a national cost of living index factor, which allowed salary dollars from entities outside of the immediate area to more accurately be compared in terms of spending power relative to the Liberty Public School District #53 area.

**Exhibit 4A** provides a summary of the results of the salary survey. Note that salaries have been normalized to hourly rates for comparison purposes. These data represent base salary only and are composed of the following information:

- **Market Range Minimum, Midpoint, and Maximum.** The Survey Range Minimum indicates the average minimum salary for each classification provided by peer school districts. Survey range midpoint provides the average midpoint of the peer respondents for each classification surveyed. Survey range maximum provides the average maximum of the survey participants for each classification surveyed.
- **Percent Differentials.** Percent Differentials are shown for survey market range minimum, midpoint, and maximum. The differentials specify the variance between District's current salary ranges and the market average shown in the exhibit. A positive differential indicates the District is above market for that classification at the range minimum, midpoint, or maximum. A negative differential indicates LPSD is below market for that classification. In the final row of the exhibit, the average percent differentials for the range minimum, midpoint and maximum are provided. This is derived by averaging each classification's percent differential.
- **Range Spread.** The Survey Range Spread provides the average range width for each classification surveyed, and is the percentage difference between the average minimum and average maximum salaries of the respondents, relative to the minimum. The average range spread for all of the surveyed classifications is provided in the final row of the exhibit.
- **Average Actual Market Salaries.** Average Actual Market Salaries are provided as not all school districts have salary schedules and ranges for key administrative positions, but rather negotiate salaries based on market and other factors. Peer average actuals are shown in comparison to the average actual LPSD salaries. As with the salary ranges, the percent differential is calculated by position and overall by averaging each classification's percent differential.
- **Survey Responses.** The number of survey responses for each classification is provided both for the average actual salary comparison and for the salary ranges, and the average number of responses for the classification category is shown at the bottom along with an overall average for all classification categories.

The following sections discuss the results of the salary survey, based on data provided in **Exhibit 4A**.



**EXHIBIT 4A**  
**MARKET RESULTS FOR BENCHMARKED POSITIONS**

Classification	LPSD Current					Survey Avg. Actual		# of Resps.	Survey Minimum		Survey Midpoint		Survey Maximum		# of Resps
	Min	Mid	Max	Spread	Average Actual	Market	% Diff		Market	% Diff	Market	% Diff	Market	% Diff	
Assistant Director, Food Services/ Nutrition	\$32.21	\$40.80	\$49.40	53.35%	\$38.33	\$29.05	24.2%	3	\$33.14	-2.9%	\$38.74	5.0%	\$44.35	10.2%	3
Assistant Principal, Elementary	\$38.16	\$48.34	\$58.52	53.35%	\$33.69	\$43.76	-29.9%	5	\$37.67	1.3%	\$45.30	6.3%	\$52.93	9.6%	10
Assistant Principal, High School	\$46.18	\$58.77	\$71.37	54.55%	\$43.50	\$51.96	-19.5%	6	\$42.63	7.7%	\$50.08	14.8%	\$57.53	19.4%	15
Assistant Principal, Middle School	\$41.98	\$53.78	\$65.57	56.20%	\$38.98	\$47.40	-21.6%	6	\$39.72	5.4%	\$46.71	13.1%	\$53.70	18.1%	15
Assistant Superintendent	\$60.35	\$74.92	\$89.48	48.26%	\$69.27	\$74.53	-7.6%	8	\$62.98	-4.3%	\$70.03	6.5%	\$77.07	13.9%	10
Chief Finance Officer	\$60.35	\$74.92	\$89.48	48.26%	\$61.63	\$79.22	-28.5%	8	\$62.55	-3.6%	\$69.45	7.3%	\$76.34	14.7%	7
Chief Operations Officer	\$60.35	\$74.92	\$89.48	48.26%	\$64.18	\$78.60	-22.5%	7	\$60.37	0.0%	\$67.22	10.3%	\$74.07	17.2%	6
Custodial Services Manager	\$32.21	\$40.80	\$49.40	53.35%	\$39.68	\$33.82	14.8%	7	\$25.13	22.0%	\$30.32	25.7%	\$35.51	28.1%	6
Custodian Supervisor (night)	\$22.00	\$28.66	\$35.31	60.50%	\$23.86	\$30.15	-26.4%	4	\$21.95	0.2%	\$28.07	2.0%	\$34.20	3.1%	5
Director, Assessment and Evaluation	\$38.97	\$49.60	\$60.23	54.55%	\$44.73	\$55.99	-25.2%	7	\$38.30	1.7%	\$47.62	4.0%	\$56.95	5.5%	5
Director, Athletics (high school level)	\$42.89	\$54.25	\$65.61	52.98%	\$49.66	\$50.37	-1.4%	8	\$36.85	14.1%	\$47.40	12.6%	\$57.96	11.7%	6
Director, Career and Technical Education	\$42.89	\$54.25	\$65.61	52.98%	\$53.73	\$48.43	9.9%	8	\$39.94	6.9%	\$49.53	8.7%	\$59.13	9.9%	6
Director, Communications & Marketing	\$42.89	\$54.25	\$65.61	52.98%	\$48.30	\$58.73	-21.6%	7	\$43.13	-0.6%	\$53.05	2.2%	\$62.98	4.0%	6
Director, Curriculum	\$42.89	\$54.25	\$65.61	52.98%	\$49.21	\$51.71	-5.1%	6	\$43.32	-1.0%	\$52.02	4.1%	\$60.71	7.5%	6
Director, Data Services	\$38.97	\$49.60	\$60.23	54.55%	\$48.84	\$53.12	-8.8%	6	\$41.94	-7.6%	\$52.52	-5.9%	\$63.10	-4.8%	6
Director, Food Services (Nutrition)	\$38.97	\$49.60	\$60.23	54.55%	\$48.84	\$51.54	-5.5%	7	\$41.98	-7.7%	\$51.70	-4.2%	\$61.42	-2.0%	8
Director, Facilities	\$38.97	\$49.60	\$60.23	54.55%	\$50.49	\$54.03	-7.0%	9	\$43.77	-12.3%	\$54.72	-10.3%	\$65.67	-9.0%	7
Director, Personnel	\$35.43	\$45.39	\$55.34	56.20%	\$59.16	\$53.90	8.9%	6	\$42.86	-21.0%	\$53.50	-17.9%	\$64.14	-15.9%	6
Director, Purchasing	\$35.43	\$45.39	\$55.34	56.20%	\$42.16	\$53.98	-28.0%	4	\$41.73	-17.8%	\$53.68	-18.3%	\$65.64	-18.6%	5
Director, Safety and Security	\$38.97	\$49.60	\$60.23	54.55%	\$48.84	\$40.10	17.9%	6	\$39.68	-1.8%	\$49.86	-0.5%	\$60.03	0.3%	8
Director, Special Services (Sp. Ed.)	\$42.89	\$54.25	\$65.61	52.98%	\$45.59	\$55.31	-21.3%	7	\$42.82	0.2%	\$52.96	2.4%	\$63.10	3.8%	5
Director, Student Services	\$42.89	\$54.25	\$65.61	52.98%	\$59.16	\$58.28	1.5%	8	\$42.81	0.2%	\$51.48	5.1%	\$60.16	8.3%	6
Director, Technology	\$42.89	\$54.25	\$65.61	52.98%	\$55.54	\$59.15	-6.5%	9	\$42.88	0.0%	\$52.73	2.8%	\$62.58	4.6%	7
Director, Transportation	\$38.97	\$49.60	\$60.23	54.55%	\$52.13	\$48.42	7.1%	5	\$41.73	-7.1%	\$53.68	-8.2%	\$65.64	-9.0%	5
Executive Director	\$57.06	\$71.13	\$85.19	49.29%	\$57.18	\$67.10	-17.3%	5	\$53.63	6.0%	\$62.46	12.2%	\$71.29	16.3%	7
Grounds Manager	\$26.62	\$34.15	\$41.69	56.60%	\$31.68	\$36.65	-15.7%	7	\$23.15	13.0%	\$28.77	15.8%	\$34.39	17.5%	6
Maintenance Manager	\$32.21	\$40.80	\$49.40	53.35%	\$36.29	\$35.66	1.7%	6	\$27.96	13.2%	\$34.27	16.0%	\$40.59	17.8%	5
Principal, Elementary School	\$42.89	\$54.25	\$65.61	52.98%	\$47.32	\$54.04	-14.2%	6	\$45.19	-5.4%	\$53.68	1.0%	\$62.18	5.2%	15
Principal, High School	\$51.88	\$64.95	\$78.03	50.42%	\$65.01	\$64.15	1.3%	6	\$56.58	-9.1%	\$62.09	4.4%	\$67.60	13.4%	15
Principal, Middle School	\$47.16	\$59.34	\$71.52	51.66%	\$53.38	\$55.27	-3.5%	6	\$48.83	-3.5%	\$54.90	7.5%	\$60.98	14.7%	15
<b>Overall Average</b>							<b>-8.3%</b>	<b>6.4</b>		<b>-0.5%</b>		<b>4.2%</b>		<b>7.2%</b>	<b>7.7</b>
<b>Outliers Removed*</b>							<b>-8.1%</b>			<b>-0.4%</b>		<b>4.1%</b>		<b>7.1%</b>	

\*Outliers are defined as benchmarks that possess midpoint differentials of 40.0 percent or greater from Liberty Public Schools or received less than five responses. Outliers are removed so that extreme differentials do not skew the average results. Among the Average Actual Salaries, three positions were considered outliers: Assistant Director, Food Services/Nutrition; Custodial Supervisor (night) and Director, Purchasing. The Asst. Director, Food Services/ Nutrition position was identified as an outlier in the study of salary ranges.

## 4.1 MARKET MINIMUM

A starting point of the analysis is to compare the peer average market minimum for each classification to range minimums. Market minimums are generally considered as a starting wage for employees who meet the minimum qualifications for the classification. Those employees with salaries at or near the range minimums are generally new to the role and have not acquired the skills and experience necessary to be fully proficient in their classification.

Utilizing the data gathered in the salary survey for the benchmarked positions, the following conclusions can be reached:

- The District is, on average, 0.4 percent below market minimum across all job titles after omitting the outliers.
- The surveyed position differentials ranged from 22.0 percent ahead of the market minimum in the case of the Custodial Services Manager classification to 21.0 percent below market minimums for the Director, Personnel classification.
- Four (4) positions were greater than 10.0 percent ahead of market minimums:
  - Custodial Services Manager - 22.0 percent ahead of market;
  - Director, Athletics (high school level) - 14.1 percent ahead of market;
  - Maintenance Manager - 13.2 percent ahead of market; and
  - Grounds Manager - 13.0 percent ahead of market.
- Three (3) positions were greater than 10.0 percent below market minimums:
  - Director, Personnel - 21.0 percent below market;
  - Director, Purchasing - 17.8 percent below market; and
  - Director, Facilities - 12.3 percent below market.

## 4.2 MARKET MIDPOINTS

This section explores the comparison between the average peer midpoints and classification midpoints. Midpoint is frequently considered the point where employees who have achieved full proficiency in their job duties could expect their salaries to be placed. It is considered the best point of comparison for analyzing variance between an organization and their market peers.

Based on the data gathered at the market midpoint of the salary range, the following can be determined:

- Administrators in the Liberty Public School District #53 are, on average, 4.1 percent ahead of market midpoint across all job titles after omitting the outliers.



- The surveyed position differentials ranged from 25.7 percent ahead of the market midpoint in the case of the Custodial Services Manager classification, to 18.3 percent below market midpoint for the Director, Purchasing classification.
- Eight (8) positions were greater than 10.0 percent ahead of market midpoints:
  - Custodial Services Manager - 25.7 percent ahead of market;
  - Maintenance Manager - 16.0 percent ahead of market;
  - Grounds Manager - 15.8 percent ahead of market;
  - Assistant Principal, High School - 14.8 percent ahead of market;
  - Assistant Principal, Middle School - 13.1 percent ahead of market;
  - Director, Athletics (high school level) - 12.6 percent ahead of market;
  - Executive Director - 12.2 percent ahead of market; and
  - Chief Operations Officer - 10.3 percent ahead of market.
- Three (3) positions are 10.0 percent or greater below markets:
  - Director, Purchasing - 18.3 percent below market;
  - Director, Personnel - 17.9 percent below market; and
  - Director, Facilities - 10.3 percent below market.

### 4.3 MARKET MAXIMUMS

In this section, salary range maximum values are compared to the survey respondent average maximums. Market maximums are often utilized to attract highly qualified employees or retain experienced individuals in a classification.

When comparing peer market pay grade maximums and maximums for classifications in the District, the following can be seen:

- LPSD is on average 7.1 percent ahead of market maximums across all job titles after omitting the outliers.
- The surveyed position differentials ranged from 28.1 percent ahead of market maximum in the case of the Custodial Services Manager classification to 18.6 percent below market maximum for the Director of Purchasing classification.
- Thirteen (13) positions are greater than 10.0 percent ahead of market at maximum;
  - Custodial Services Manager - 28.1 percent ahead of market;
  - Assistant Principal, High School - 19.4 percent ahead of market;
  - Assistant Principal, Middle School - 18.1 percent ahead of market;
  - Maintenance Manager - 17.8 percent ahead of market;
  - Grounds Manager - 17.5 percent ahead of market;
  - Chief Operations Officer - 17.2 percent ahead of market;
  - Executive Director - 16.3 percent ahead of market;
  - Principal, Middle School - 14.7 percent ahead of market;





- Chief Finance Officer - 14.7 percent ahead of market;
  - Assistant Superintendent - 13.9 percent ahead of market;
  - Principal, High School - 13.4 percent ahead of market;
  - Director, Athletics (high school level) - 11.7 percent ahead of market; and
  - Assistant Director, Food Services/Nutrition - 10.2 percent ahead of market.
- Two (2) positions are greater than 10.0 percent below market maximums:
    - Director, Purchasing - 18.6 percent below market; and
    - Director, Personnel - 15.9 percent below market.

#### 4.4 MARKET AVERAGE ACTUALS

In this section, salary average actual values are compared to the survey respondent average actuals. Market average actuals indicate what peer school districts are actually paying, and are particularly important for administrative positions as not all school districts have salary schedules and ranges for key positions, but rather negotiate a salary based on market and other factors.

When comparing peer market pay grade maximums and maximums for classifications in the Liberty Public School District #53, the following can be determined:

- The District is, on average, 8.1 percent below market average actuals across all job titles after omitting the outliers.
- The surveyed position differentials ranged from 17.9 percent ahead of market average actuals in the case of the Director, Safety and Security to 29.9 percent below for the Assistant Principal, Elementary; 28.5 percent below for the Chief Finance Officer; 25.2 percent below for the Director, Assessment and Evaluation; 22.5 percent below for the Chief Operations Officer; 21.6 percent below for the Director, Communications and Marketing; 21.6 percent below for the Assistant Principal, Middle School; and 21.3 percent below for the Director, Special Services (Special Education) classifications.
- Two (2) positions are greater than 10.0 percent ahead of market at average actuals;
  - Director, Safety and Security - 17.9 percent ahead of market; and
  - Custodial Services Manager - 14.8 percent ahead of market.
- Eleven (11) positions are greater than 10.0 percent below the market average actuals:
  - Assistant Principal, Elementary - 29.9 percent below market;
  - Chief Finance Officer - 28.5 percent below market;
  - Director, Assessment and Evaluation - 25.2 percent below market;
  - Chief Operations Officer - 22.5 percent below market;
  - Director, Communications and Marketing - 21.6 percent below market;
  - Assistant Principal, Middle School - 21.6 percent below market;
  - Director, Special Services (Special Education) - 21.3 percent below market;





- Assistant Principal, High School - 19.5 percent below market;
- Executive Director - 17.3 percent below market;
- Grounds Manager - 15.7 percent below market; and
- Principal, Elementary School - 14.2 percent below market.

#### 4.5 ADMINISTRATIVE SUPPLEMENTS

As shown in **Exhibit 4B**, administrative supplements were also surveyed. Responses are shown first as a total count of responses and secondly as the number of positive responses, indicating the number of peer school districts that offer a specific type of supplement. Because there are fewer than five positive responses in every category, the differential is not reliable and is therefore not shown.

#### EXHIBIT 4B MARKET RESULTS FOR ADMINISTRATIVE SUPPLEMENTS

Type of Stipend/Supplement	LPSD Supplements	Average Peer Supplement*	# of Responses	# of Peer School Districts Offering Supplements
<b>Education-Related</b>				
Doctorate Degree	\$3,000	\$2,670	15	5
Education Specialist Certification	\$1,500		15	0
Other - National Board Certification		\$2,500	1	1
Other - National Certification - School Psychologist		\$3,500	1	1
<b>Longevity</b>				
0-5 Years	\$3,000	\$100	15	1
6-10 years	\$4,200	\$200	15	1
11-15 years	\$5,400	\$300	15	1
16-20 years	\$7,800	\$400/\$500/\$600	15	1
<b>Executive Level</b>				
Assistant Superintendent	\$9,900		15	0
Chief Operating Positions	\$9,900		15	0
<b>Travel</b>				
Limited Travel	\$684	\$551	15	3
Moderate Travel	\$1,104	\$1,064	15	3
Extensive Travel	\$2,400	\$2,680	15	3
<b>Other - Cell Phone</b>		<b>\$420/\$780</b>	<b>3</b>	<b>1</b>

\*based on annual amounts.



As can be seen, the majority of peer school districts do not provide administrative supplements or stipends. The Francis Howell Schools do not have supplements per se, but they provided an Administrator Salary Worksheet that contains percentage factors for responsibility, education, credits for prior years of service, and the like.

Supplements for a Doctorate and Travel were used by some peers. Three peers provided a range of travel supplement amounts in each category, whereas one peer simply responded that administrators are reimbursed at a rate of \$0.535 per mile. Only one peer stated a cell phone supplement was provided. During conversations, however, other peers mentioned that they reimburse administrators and other staff for personal cell phone use or provide cell phones to designated staff.

#### **4.6 MARKET SURVEY CONCLUSION**

The Liberty Public School District #53 is, on average, slightly below the market minimums but is above market midpoints and maximum levels. Of note is the fact that District's average actual salaries are below the market averages—indicating that there may be some obstacles impeding the tenured employees from moving through the salary ranges. Individual exceptions can be seen throughout the positions surveyed. This survey confirms some of the concerns voiced during the focus groups sessions regarding lower than market salaries. Information gained from this market survey was used in conjunction with other factors to develop a recommended compensation plan that places the District in a strong position to stay competitive in today's market. Discussion on the recommended changes to the District's pay plan for administrators can be found in **Chapter 5** of this report.



## Chapter 5 - Recommendations

The recommendations in this chapter seek to build upon the strengths of the Liberty Public School District #53 administrative compensation and classification plan, and also to address the challenges observed by Evergreen consultants over the course of the study. Internal factors—such as the future direction of the District, the organizational culture, and availability of resources—influence these recommendations. Each recommendation has been developed to address a specific need based on the collected information while taking into account the external environment. Arriving at the overall solution for the District was a detailed process involving all components of the research conducted which were reviewed and discussed in previous chapters of this report.

A classification analysis is designed to identify and rectify issues of internal equity as well as help the organization reflect on recent task and responsibility changes. The combination of competition from local school districts causes even more importance to be placed on the quality and responsiveness of the classification system. Classification illustrates how work is organized as well as how the human resources are used to meet the needs and perform the core services of any organization.

An analysis of the District's compensation and classification system for central office and school administrators revealed a number of opportunities for improvement. The recommendations presented in this chapter seek to build on the strengths of the current system while addressing the areas of opportunity identified over the course of the study. Evergreen is proposing changes to the District's structure that use the existing plan as a foundation while improving internal equity, market competitiveness, transparency, and ease of administration of the system. Each administrative classification was reviewed relative to market equity data and internal equity relationships. Using this methodology, Evergreen developed a solution that improves the District's competitive position relative to its market peers while seeking to preserve internal equity for administrators.

### FINDING

Ensuring that the structural elements of a salary table are competitive with the market is just as important as ensuring actual salaries are competitive with other organizations. As such, a component of this study included assessing the salary schedule used in administering compensation in the Liberty Public School District #53.



Based on the analysis of the salary table in place for administrators in the District (see **Chapter 3** for the expanded analysis), the following observations were made:

- Range spread, set at an average of 38 percent, varies across ranges. Each range has a total of 19 steps, and the distance between each range's midpoint and the next sequential range's midpoint averages 10.0 percent. There are a total of 42 classification titles and 76 employees within the administrative salary schedule.
- While anomalies exist in the relationship between experience and range penetration, generally the District maintains a generally healthy positive linear relationship between these two variables. Other factors, such as promotional practices, are known to skew the correlation between years of experience and step placement.

**RECOMMENDATION 1: Adopt the proposed salary table displayed in Exhibit 5A to address the weaknesses in the administrative salary table identified by Evergreen in the Liberty Public School District #53.**

The recommended salary table in **Exhibit 5A**:

- maintains the District's existing grade structure, but adds an additional step to the top of the pay ranges to bring the total number of steps up to 20;
- increases the range spread of Grades 1 through 12 to match that of Grades 13 and 14 for a consistent range spread of 40.1 percent; and
- merges the salary tables with the administrator stipend for Ranges 13 and 14. The administrator stipends for all other administrators are left unchanged, but are not included in the range values as the value of the stipend is unique to each employee's years of experience (see **Recommendation 3**).



**EXHIBIT 5A  
PROPOSED ADMINISTRATIVE SALARY TABLE**

Grade/Step	1	2	3	4	5	6	7	8	9	10
14	\$147,991	\$151,115	\$154,239	\$157,363	\$160,486	\$163,610	\$166,734	\$169,858	\$172,982	\$176,106
13	\$135,438	\$138,297	\$141,156	\$144,015	\$146,874	\$149,732	\$152,591	\$155,450	\$158,309	\$161,168
12	\$114,125	\$116,534	\$118,943	\$121,352	\$123,761	\$126,170	\$128,579	\$130,988	\$133,397	\$135,806
11	\$103,750	\$105,940	\$108,130	\$110,320	\$112,510	\$114,700	\$116,890	\$119,080	\$121,270	\$123,460
10	\$94,318	\$96,308	\$98,298	\$100,288	\$102,278	\$104,268	\$106,258	\$108,248	\$110,238	\$112,228
9	\$85,744	\$87,554	\$89,364	\$91,174	\$92,984	\$94,794	\$96,604	\$98,414	\$100,224	\$102,034
8	\$77,949	\$79,594	\$81,239	\$82,884	\$84,529	\$86,174	\$87,819	\$89,464	\$91,109	\$92,754
7	\$70,862	\$72,358	\$73,854	\$75,350	\$76,846	\$78,342	\$79,838	\$81,334	\$82,830	\$84,326
6	\$64,420	\$65,779	\$67,138	\$68,497	\$69,856	\$71,215	\$72,574	\$73,933	\$75,292	\$76,651
5	\$58,564	\$59,800	\$61,036	\$62,272	\$63,508	\$64,744	\$65,980	\$67,216	\$68,452	\$69,688
4	\$53,240	\$54,364	\$55,488	\$56,612	\$57,736	\$58,860	\$59,984	\$61,108	\$62,232	\$63,356
3	\$48,400	\$49,421	\$50,442	\$51,463	\$52,484	\$53,505	\$54,526	\$55,547	\$56,568	\$57,589
2	\$44,000	\$44,929	\$45,858	\$46,787	\$47,716	\$48,645	\$49,574	\$50,503	\$51,432	\$52,361
1	\$40,000	\$40,845	\$41,690	\$42,535	\$43,380	\$44,225	\$45,070	\$45,915	\$46,760	\$47,605

Grade/Step	11	12	13	14	15	16	17	18	19	20
14	\$179,230	\$182,353	\$185,477	\$188,601	\$191,725	\$194,849	\$197,973	\$201,097	\$204,220	\$207,344
13	\$164,027	\$166,886	\$169,745	\$172,603	\$175,462	\$178,321	\$181,180	\$184,039	\$186,898	\$189,757
12	\$138,215	\$140,624	\$143,033	\$145,442	\$147,851	\$150,260	\$152,669	\$155,078	\$157,487	\$159,896
11	\$125,650	\$127,840	\$130,030	\$132,220	\$134,410	\$136,600	\$138,790	\$140,980	\$143,170	\$145,360
10	\$114,218	\$116,208	\$118,198	\$120,188	\$122,178	\$124,168	\$126,158	\$128,148	\$130,138	\$132,128
9	\$103,844	\$105,654	\$107,464	\$109,274	\$111,084	\$112,894	\$114,704	\$116,514	\$118,324	\$120,134
8	\$94,399	\$96,044	\$97,689	\$99,334	\$100,979	\$102,624	\$104,269	\$105,914	\$107,559	\$109,204
7	\$85,822	\$87,318	\$88,814	\$90,310	\$91,806	\$93,302	\$94,798	\$96,294	\$97,790	\$99,286
6	\$78,010	\$79,369	\$80,728	\$82,087	\$83,446	\$84,805	\$86,164	\$87,523	\$88,882	\$90,241
5	\$70,924	\$72,160	\$73,396	\$74,632	\$75,868	\$77,104	\$78,340	\$79,576	\$80,812	\$82,048
4	\$64,480	\$65,604	\$66,728	\$67,852	\$68,976	\$70,100	\$71,224	\$72,348	\$73,472	\$74,596
3	\$58,610	\$59,631	\$60,652	\$61,673	\$62,694	\$63,715	\$64,736	\$65,757	\$66,778	\$67,799
2	\$53,290	\$54,219	\$55,148	\$56,077	\$57,006	\$57,935	\$58,864	\$59,793	\$60,722	\$61,651
1	\$48,450	\$49,295	\$50,140	\$50,985	\$51,830	\$52,675	\$53,520	\$54,365	\$55,210	\$56,055



The proposed salary table conforms to best practice, while using the existing District salary table as a framework. In addition, the proposed salary table should allow the Liberty Public School District #53 to slot classifications at or near market value now and moving forward as administrative positions are created or revised, as well as ensure internal equity across all administrative positions.

## FINDING

In order to determine the appropriate placement of all administrative classifications onto the proposed salary table, Evergreen conducted a two-part analysis. This process included an external equity analysis of market compensation data collected using a salary survey instrument, and an internal equity analysis of each of the District's administrative classifications using a job assessment questionnaire completed by employees and reviewed by supervisors. Evergreen then reviewed all placements to ensure accuracy. The Job Assessment Questionnaire (JAT) produced an internal score (JAT score) for each District classification based on five job factors which in essence reflect a classification's level of complexity. Using these data, Evergreen analyzed the correlation between the scores and each classification's current pay grade—attempting to identify anomalies between score level and pay grade value.

The external market compensation analysis identified administrative classifications compensated below market average, while the internal equity analysis identified administrative classifications compensated disproportionately to other District classifications based on complexity of the job performed—where classifications with like complexity levels would be expected to be compensated similarly. The results from these analyses were combined using regression to determine appropriate placement on the proposed salary table. Specifically, regression analysis established a relationship between market values and JAT scores. This relationship was then applied to each classification's JAT score to approximate an appropriate level of compensation for each administrative classification. This approximate level of compensation was then translated to a specific pay grade on the proposed salary table.

Proposed placement ensures that classifications are being compensated competitively in comparison to the market, and that internally classifications are being equitably compensated based on similar levels of job complexity and responsibility. Based on this two-fold analysis, Evergreen identified proposed placement for each classification into the proposed salary table as well as recommendations for title changes. Title changes recommended by employees and supervisors were assessed to determine appropriateness given the internal JAT data and external market data.

In addition to a thorough compensation review, Evergreen reviewed the titles of all employees included in the study to determine if these titles corresponded to the scope of work and level of responsibility of each position.

**RECOMMENDATION 2:** Adopt the proposed grade order list in Exhibit 5B and the recommended class title changes in Exhibit 5C, which attempt to ensure both internal and external equity for administrators in the Liberty Public School District #53. Finally, adjust employee salaries using an Experience Parity model.





**Exhibit 5B** displays the proposed slotting for all classifications in the Liberty Public School District #53. This exhibit also displays the current pay grade values for comparison purposes. Note that classifications were slotted based on regression value or current value—whichever was greater. That is, when positions are found to be slotted above regression value they are left as-is until a time when market catches up. In proposing title changes and position slotting, both supervisor feedback from both the Job Assessment Tool (JAT) process and the Management Issues Tool (MIT) process were considered.

**EXHIBIT 5B  
PROPOSED GRADE ORDER LIST FOR ADMINISTRATORS**

PROPOSED CLASS TITLE	GRADE	MIN	MID	MAX
Assistant Coordinator - Kid's Zone	3	\$48,400.00	\$58,099.50	\$67,799.00
Assistant Director - Nutrition Services	6	\$64,420.00	\$77,330.50	\$90,241.00
Assistant Director - Transportation	6	\$64,420.00	\$77,330.50	\$90,241.00
Assistant Director of Special Education	7	\$70,862.00	\$85,074.00	\$99,286.00
Assistant Principal – Elementary School	6	\$64,420.00	\$77,330.50	\$90,241.00
Assistant Principal - High School	8	\$77,949.00	\$93,576.50	\$109,204.00
Assistant Principal - Middle School	7	\$70,862.00	\$85,074.00	\$99,286.00
Assistant Superintendent	13	\$135,438.00	\$162,597.40	\$189,756.80
Assistant Superintendent	13	\$135,438.00	\$162,597.40	\$189,756.80
Chief Financial Officer	13	\$135,438.00	\$162,597.40	\$189,756.80
Chief Operations Officer	13	\$135,438.00	\$162,597.40	\$189,756.80
Coordinator I - Kids Zone	4	\$53,240.00	\$63,918.00	\$74,596.00
Coordinator of Nutrition & Culinary Services	4	\$53,240.00	\$63,918.00	\$74,596.00
Coordinator of Nutrition Services Operations	4	\$53,240.00	\$63,918.00	\$74,596.00
Custodial – District Level Supervisor	3	\$48,400.00	\$58,099.50	\$67,799.00
Director I - Human Resources Operations	8	\$77,949.00	\$93,576.50	\$109,204.00
Director I - Library Media	7	\$70,862.00	\$85,074.00	\$99,286.00
Director I - Purchasing & Distribution	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Administrative Services	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Assessment & Evaluation	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Data Services	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Facilities & Grounds	9	\$85,744.00	\$102,939.00	\$120,134.00
Director II - Health Services	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Nutrition Services	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Safety & Security	8	\$77,949.00	\$93,576.50	\$109,204.00
Director II - Transportation	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Alternative Education	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Athletics & Activities	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - College/Career Readiness	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Communications & Marketing	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III – Curriculum	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Fine Arts	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Human Resources	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Special Services	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III - Student Services	9	\$85,744.00	\$102,939.00	\$120,134.00
Director III – Technology	9	\$85,744.00	\$102,939.00	\$120,134.00
Energy Conservation Manager	6	\$64,420.00	\$77,330.50	\$90,241.00
Executive Director (Admin)	12	\$114,125.00	\$137,010.50	\$159,896.00
Manager I – Grounds	4	\$53,240.00	\$63,918.00	\$74,596.00
Manager III - Custodial Services	6	\$64,420.00	\$77,330.50	\$90,241.00
Manager III – Maintenance	6	\$64,420.00	\$77,330.50	\$90,241.00
Principal – Elementary School	9	\$85,744.00	\$102,939.00	\$120,134.00
Principal - High School	11	\$103,750.00	\$124,555.00	\$145,360.00
Principal - Middle School	10	\$94,318.00	\$113,223.00	\$132,128.00



Exhibit 5C displays the proposed classification title changes for selected administrators in the District.

**EXHIBIT 5C  
PROPOSED CLASS TITLE CHANGES**

CURRENT CLASS TITLE	PROPOSED CLASS TITLE
Custodial-District Level Supervisor	Assistant Manager - Custodial Services
Director I - Human Resources Operations	Director II - Human Resources Operations
Director I - Purchasing & Distribution	Director II - Purchasing & Distribution
Director II - Facilities & Grounds	Director III - Facilities & Grounds
Director II - Transportation	Director III - Transportation
Energy Conservation Manager	Sustainability Manager

There is not a “correct” approach for transitioning employees into the proposed system. For this transition, Evergreen recommends administrative employees be placed on a step that corresponds with their years of experience. This approach places employees into their newly assigned pay grade based on their years of experience compared to the maximum number of steps. For example, an employee with 10 years of experience is expected to be 50 percent into their pay grade range (i.e. midpoint) based on a 20-year career (10 years/20 years = 50%).

Administrative employees whose salaries are already at or above this expected amount are unchanged, but employees whose current salaries fall below this expected amount are brought up to this level. This option addresses compression by factoring in employee experience both inside and outside the District.

Based on current administrative employee data, the cost for implementation would be \$241,857. If a step increase is also included, the annual cost would be \$359,999.

Various options also exist to phase-in Evergreen’s recommendations. For example, in Year One of implementation, the District could move 50 percent onto the recommended schedule, and in Year Two move fully to the proposed schedules. While phasing in recommendations is sometimes unavoidable due to financial constraints, a number of unintentional impacts can arise from the process—such as prioritizing one group over another, skewing compensation, never reaching full implementation, and creating or exacerbating compression.

**FINDING**

The Liberty Public School District #53 offers a longevity supplement to administrators. This is clearly a unique benefit. When a District employee is brought up to the administrator level, they are given the following incentives for years served:

- 0-5 Years = \$3,000





- 6-10 Years = \$4,200
- 11-15 Years = \$5,400
- 16-20 Years = \$7,800

It is important to note that administrators at Ranges 13 and 14 receive \$9,900 regardless of years of service.

With one exception, no other peer school district offers such as a longevity supplement. Only the school district in Olathe, Kansas, provides a minimal longevity supplement as follows:

- 0-5 Years = \$100
- 6-10 Years = \$200
- 11-15 Years = \$300
- 16-20 Years = \$500

**RECOMMENDATION 3:** Based on focus groups, interviews and phone calls, Evergreen is proposing no change to this administrative supplement with the exception of incorporating the \$9,900 for Grades 13 and 14 into the administrative salary schedule itself, since it is not a longevity-based supplements.

The rationale for the status quo recommendation is our belief that this longevity supplement is an integral part of the District's compensation philosophy for administrators. If we made a recommendation based solely on external market and best practice analyses, the recommendation would be different.

## FINDING

Another unique situation in the Liberty Public School District #53 is the variation in work days per year required for central office administrators. While it is common for assistant principals, especially at the elementary level, to work fewer days (e.g., 211 days in Liberty), it is not common to have both 250- and 260-day work schedules for other administrators.

**RECOMMENDATION 4:** For consistency and uniformity, assign all central office administrators in the Liberty Public School District #53 to a 250-day annual work schedule.

## FINDING

The Liberty Public School District #53 does not currently have an established systematic approach which can be followed to evaluate positions either at the time they are created, when they have changed or evolved, or on an annual basis. As such, as part of this study, Evergreen was tasked with establishing a job evaluation process for the District which can be used moving forward. Further, this action ensures alignment with the process used by Evergreen and resulting outcomes.



The tool used by Evergreen to assess internal job worth is the Job Assessment Tool (JAT). The results of this tool, paired with market data, provide a data-driven value that is used to match the classification under review up to an appropriate midpoint on the District's salary schedule. With all administrative classifications now assessed and slotted using this methodology, the Liberty Public School District #53 has an excellent foundation upon which to base compensation and classification-related decisions surrounding any administrative or other positions. All that is needed to maintain this foundation is fresh market data and updated JAT scores as any position evolves or new positions are created.

**RECOMMENDATION 5: Adopt the Job Assessment Tool and market data-based methodology from Evergreen to consistently evaluate new and updated position titles.**

The Liberty Public School District #53 should adopt the JAT and market-driven approach for all future job evaluations. This process serves as an unbiased means to capture a snapshot of a position's current duties and requirements, as well as identify a reasonable level of compensation.

Using this process, the District should evaluate new and updated position titles, as needed or annually, to determine an appropriate title and appropriate pay grade as follows:

1. Supervisor completes and submits a Job Review Form to Human Resources to request a job evaluation for either a new or modified existing position. The proposed form is displayed in **Exhibit AD** at the end of the chapter. Note that one form per job issue should be submitted.
2. Human Resources (HR) staff receives the Job Review Form and determines what action is needed; if action requires completion of JAT, a blank JAT is emailed by HR to the Supervisor for completion. If the position is new, the JAT should be filled out by the person with the most knowledge of the position. If no JAT is needed, HR staff proceeds to **Step 6**.
3. Supervisor completes JAT and submits to HR within five business days of receiving.
4. HR receives and reviews the JAT for accuracy. The score is put into the existing regression database (provided by Evergreen).
5. If market data on file are greater than one year old or not available for the position in question, fresh market data are collected from market peers.
6. The average market midpoint is entered into existing regression database by HR.
7. With JAT and market data, the regression database provides HR staff with a **projected midpoint** driven strictly by the data. The projected midpoint is used to place the position on the District's salary schedule. However, factors such as turnover, recruitment difficulty/market demand, and District hierarchy are not captured in this analysis and must also be considered when determining final placement.



8. HR staff record final recommended pay grade and job title in the second section of the Job Review Form within 14 days of receiving the request (see **Exhibit BE**).
9. A copy is emailed to the Supervisor as well as to the Director of Human Resources for final approval.

**EXHIBIT AD  
PROPOSED JOB REVIEW FORM – PART ONE**

# Job Review Form

Please complete all fields, scan, and electronically submit to the Human Resources Department. Please allow as many as 14 business days for processing.

**DEPARTMENT HEAD COMPLETES**

Requester Name and Title:	
Phone:	
E-mail Address:	
Department:	
Today's Date:	
Job Title for Review:	
Position Type (New or Existing):	
Reason for Review:	
Desired Outcome:	



**EXHIBIT BE  
PROPOSED JOB REVIEW FORM – PART TWO\***

<b>HR USE ONLY</b>	
Form Received by:	
Form Reviewed by:	
Today's Date:	
<b>Action:</b>	
JAT Sent (Y/N):	<input type="checkbox"/> Yes <input type="checkbox"/> No   Once Returned, record date received _____
Market Data Needed (Y/N):	<input type="checkbox"/> Yes <input type="checkbox"/> No
Final JAT Score	
Market Midpoint Value	
Regression Midpoint	
Title Recommendation:	
Grade Recommendation:	
Explanation of Findings:	
Reviewer Notes:	

Signature: _____ <p align="center"><b>Assistant Superintendent</b></p> Date: _____	Signature: _____ <p align="center"><b>Supervisor</b></p> Date: _____
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\*Part One and Part Two are contained on the same sheet.



With this process in place, and continued use of the JAT and market data in making classification and compensation decisions, the Liberty Public School District #53 will ensure an equitable system is maintained.

## **FINDING**

Even with these efforts to maintain the effectiveness of a classification and compensation system, an organization may find it struggles to navigate through changing economic conditions and with school districts competing for the same human resources. For this reason, the Liberty Public School District #53 should conduct a comprehensive classification and compensation study for administrators every three to five years.

**RECOMMENDATION 6: Conduct a comprehensive administrative classification and compensation study every three to five years.**

## **SUMMARY**

The recommendations in this chapter provide a competitive administrative salary schedule, internally equitable classification structure, and system administration practices that will provide the Liberty Public School District #53 with a responsive compensation and classification system for administrators for years to come. While the upkeep of this recommended system and associated pay and classification guidelines will require work, the District will find that having a competitive compensation and classification system that encourages strong recruitment and administrative employee retention is well worth the effort.

The **Appendix** to this report contains the appeals process which will occur after the final report is approved.



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*Appendix:  
Appeals Process*



**LIBERTY PUBLIC SCHOOL DISTRICT #53, MISSOURI  
ADMINISTRATIVE COMPENSATION AND CLASSIFICATION STUDY**

**Appeal Process**

District employees may seek reconsideration of the outcome of the Liberty Public School District #53, Missouri performed by Evergreen Solutions. Employees may appeal the classification and/or the pay grade assigned to the classification. Employees may not appeal their salary placement within a range.

**Appeal Process**

- Any administrative Liberty Public School District #53, Missouri employee may file an appeal of their classification (job title) and/or their pay grade for the position.
- All appeals must be filed by with two weeks.
- All appeals are to be submitted to Dr. Robert J. Vogelaar, Assistant, Superintendent of Human Resources, to be logged in.
- Human Resources will forward all appeals/reconsideration requests to Evergreen Solutions for review and determination if a change is appropriate.
- Evergreen Solutions will review all documents gathered to evaluate the position being appealed, including additional information included on the appeals form.
- Evergreen Solutions will review and render a determination regarding the appeal within two weeks of receipt of the appeals.
- Evergreen Solutions will submit their recommendation to Dr. Robert J. Vogelaar.
- Dr. Robert J. Vogelaar will render the final decision within ten (10) days of receiving Evergreen Solutions' recommendations.

Attached is the form for filing an appeal. If you have questions please contact Dr. Robert J. Vogelaar, Assistant Superintendent of Human Resources at (816) 736-5300



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**EVERGREEN SOLUTIONS, LLC  
LIBERTY PUBLIC SCHOOL DISTRICT  
#53, MISSOURI  
ADMINISTRATIVE COMPENSATION  
AND CLASSIFICATION STUDY  
EMPLOYEE RECONSIDERATION  
PROCESS**

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District employees may seek reconsideration of the individual outcomes of the Liberty Public School District #53, Missouri recent Administrative Compensation and Classification Study by completing this employee reconsideration document.

Employees that want to request an individual reconsideration should complete and submit the attached form to the Human Resources (HR) department. HR will log in all forms and forward them to Evergreen Solutions for review. An employee may only seek reconsideration of recommendations related to the classification or job title for their position and/or the pay grade or pay range for their position. An employee may not seek reconsideration of their individual pay rate or salary.

Requests for reconsideration should clearly and concisely state the employee's request and should provide adequate and accurate information supporting the reconsideration. Any supporting documentation should be attached to the request.

All requests for reconsideration must be received by the HR department by close of business on (DATE.) Evergreen Solutions will review all reconsideration requests and provide recommended determinations by (DATE) to the Liberty Public School District #53, Missouri HR department. The Liberty Public School District #53, Missouri Will Communicate the results of the requests to individual employees by (DATE.)

Please direct any questions you may have regarding this process to Dr. Robert J. Vogelaar, Assistant, Superintendent of Human Resources.





EVERGREEN SOLUTIONS, LLC  
EMPLOYEE RECONSIDERATION DOCUMENT

<b>EMPLOYEES</b>			
Employee Name			
Department		Employee ID	
Original Job Classification (Title)			
Was a Job Assessment Tool (JAT) submitted by or for this employee?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Is your request related to your job classification (title)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
What job classification (title) are you requesting to be moved to?			
Please provide justification for your request.			
Is your request related to your pay grade or range?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
What pay grade or range are you requesting to be moved to?			
Please provide justification for your request.			



**DEPARTMENT DIRECTORS (Optional)**

<b>Dept. Director Name</b>	
<b>Dept. Director Job Title</b>	
<b>Please provide comments related to this employee's request.</b>	

<b>Employee Signature</b>	
<b>Date Submitted</b>	

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# *Resumes*



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# Jeffrey Ling, Ph.D., CCP

## President

### Evergreen Solutions, LLC

Dr. Ling's experience includes human resources, strategic planning, research methodology, and change management. He has taught courses addressing human resources, research methodology, statistical analysis, and political economy at various universities. Similarly, he has planned, organized, and managed studies on human resources assessment, and government efficiency. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations.

#### **Education / Certifications**

Ph.D., Political Science, Florida State University, 1996

M.S., Political Science, Florida State University, 1993

B.A., Political Science, University of Tampa, 1990

Certified Compensation Professional (CCP), 2016

Board Member, Center for Human Resource Management, Florida State University

#### **Professional and Business History**

**Evergreen Solutions, LLC, President, December 2019 to present;  
Executive Vice President, August 2005 – December 2019**

MGT of America, Inc., Partner, May 2004–July 2005; Principal, September 2000–April 2004; Senior Associate, November 1999–September 2000; Senior Consultant, April 1999–November 1999; Consultant, 1998–1999; Senior Analyst, May 1998–November 1998

The College of Wooster, Assistant Professor, 1997–1998

Iowa State University, Visiting Scholar, 1995–1997

Florida State University, Research Assistant, 1992–1995

Stinger Systems, Market Analyst, 1990–1992

#### **Selected Relevant Project Experience**

##### **Education and Missouri Public Sector Experience**

Project Principal of a Compensation and Classification Study for the Liberty Public School District No. 53, Missouri

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Project Principal of a Salary Equity Study Consultant for Southeast Missouri State University

Project Principal of a Market Salary Survey for Missouri Western State University

Project Principal of a Classification and Compensation Plan for Non-Faculty Positions and Non-Exempt Positions for Missouri Southern State University

Project Principal of a Compensation and Classification Data Review Services for Metropolitan Community College, Missouri

Project Director of an Employee Classification and Compensation Study for McHenry County College, Illinois

Project Director of a Compensation Study for Shawnee Community College, Illinois

Project Director of a Performance Management Study for Morehead State University, Kentucky

Project Director of a Benefits and Compensation Study for Corning Community College, New York

Project Director of a Faculty Salary Compression Study for Corning Community College, New York

Project Director of a Total Compensation Study for Finger Lakes Community College, New York

Project Principal of a Position Description Review and Salary Comparison Analysis for Purchase College, State University of New York

Project Director a Compensation, Classification, and Organizational Study for SUNY Ulster, New York

Project Director for of a Management Classification and Compensation Study for Middlesex Community College, New Jersey

Project Director of a College Wide Classification and Compensation Study for Hudson County Community College, New Jersey

Project Consultant of a School District Operations and Staffing Study for Needham Public Schools, Massachusetts

Project Consultant of an Organizational, Effectiveness, and Efficiency Study for Manchester Public Schools, Connecticut

Team Leader for Technology in a Management Curriculum Audit of the Guam Public School System

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Team Leader for an Organizational and Operational Review of Philadelphia Public Schools, Pennsylvania

Project Director of a Comprehensive Compensation, Classification, and Organization Design and Structure Study for Portland Public Schools, Maine

Project Principal of a Classification and Compensation Study for Richland County School District One, South Carolina

Project Principal of a Compensation and Staffing Study for Pickens County School District, South Carolina

Project Principal of a Job Classification and Compensation Study for Chesapeake College, Maryland

Project Director of a Compensation and Benefits Study for Hagerstown Community College, Maryland

Project Director of a Compensation Plan Update for Chesapeake College, Maryland

Project Director of a Job Classification and Compensation Study for Howard Community College, Maryland

Project Director of a Compensation Study for Harford Community College, Maryland

Project Director of a Job Classification and Compensation Analysis for Wor-Wic Community College, Maryland

Project Director of a Pay Compression Study for Allegany College of Maryland

Project Director of a Job Classification and Compensation Review for Morgan State University, Maryland

Project Director of a Job Classification and Compensation Analysis for Carroll Community College, Maryland

Project Director of a Position Classification and Compensation Analysis for the College of Southern Maryland

Project Director of an Employee Classification and Compensation Analysis for Manassas City Public Schools, Virginia

Project Principal of a Compensation Study for the York County School Division, Virginia

Project Principal of a Classification and Compensation Study for Culpeper County Public Schools, Virginia

Technical Advisor of a Compensation Study for Pittsylvania County Schools, Virginia

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Project Director of a Salary Scale Study for Loudoun County Public Schools, Virginia

Project Principal of a Classification and Compensation Study for Williamsburg-James City County Public Schools, Virginia

Technical Advisor of a Compensation and Classification Study for Prince George County Public Schools, Virginia

Project Principal of a Compensation Study for Montgomery County Public Schools, Virginia

Project Principal of a Classification and Compensation Study for Clarke County Public Schools, Virginia

Project Principal of a Pay Plan Study for Salem City Schools, Virginia

Project Director of a School Efficiency Review for the City of Martinsville Schools, Virginia

Project Consultant of an Efficiency Review for Stafford County Public Schools, Virginia

Project Principal of a Compensation and Classification Study for Suffolk Public Schools, Virginia

Project Principal of a Classification and Compensation Plan Update for Suffolk Public Schools, Virginia

Team Leader for Human Resources on School Efficiency Reviews for Covington City and Alleghany County Public School Divisions, Virginia

Assistant Project Director of a Financial Review of Davie County Public Schools, North Carolina

Project Consultant of a Financial Review of Lee County Public Schools, North Carolina

Project Principal of a Comprehensive Salary Study for Chatham Public Schools, North Carolina

Assistant Project Director of a Classified Employment Study for Chapel Hill-Carrboro City Schools, North Carolina

Project Director of a Compensation and Classification Study for Wake Technical Community College, North Carolina

Project Principal of a Compensation Study for Washtenaw Community College, Michigan

Project Principal of a Compensation Study for Florida Virtual School

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Project Principal of Classification and Compensation Study Services for Hillsborough Community College, Florida

Project Principal of a Compensation and Classification Study for Edison State College, Florida

Project Principal of a Compensation and Classification Study for Palm Beach State College, Florida

Project Director of a Staff Classification and Compensation Study for St. Johns River State College, Florida

Project Principal of a Salary Analysis for Palm Beach State College, Florida

Project Principal of a Performance Management Study for Seminole State College, Florida

Project Principal of Compensation Consulting Services for the State College of Florida – Sarasota-Manatee

Team Leader of Information Technology Supplemental Staffing Services for Hillsborough County Public Schools, Florida

Project Principal of a Compensation and Classification Study for Brevard County Schools, Florida

Project Principal of a Districtwide Job Classification and Compensation Study for the Escambia County School District, Florida

Project Principal of a Position Classification Study of St. Lucie County Schools, Florida

Team Leader for the Human Resources Review of an Administrative Study of the Monroe County School District, Florida

Project Director of a Salary Survey for North Florida Community College

Project Director for a Compensation and Classification Study for Tuscaloosa City Schools, Alabama

Project Principal for a Compensation and Classification Study for Douglas County School System, Georgia

Project Principal of a Compensation and Classification Study for Atlanta Public Schools, Georgia

Project Principal of a Superintendent Salary Review for Atlanta Public Schools, Georgia

Project Principal of a Salary Study for Atlanta Metropolitan College, Georgia

Project Principal of a Compensation and Classification Study for Sumter County Schools, Georgia



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Project Director of a Job Description and Compensation Study for the University of Texas at Tyler

Project Director of a Compensation Study for Alvin Community College, Texas

Project Principal of a Human Resources Department Evaluation for Sam Houston State University, Texas

Project Director of a Classification and Compensation Study for the Lone Star College System, Texas

Project Principal of a Job Classification and Compensation Study for El Paso Community College District, Texas

Project Principal of a Salary Study for Sul Ross State University, Texas

Project Director of a Compensation and Classification Study for Midwestern State University, Texas

Project Director of a Staffing Analysis for Midwestern State University, Texas

Project Principal of a Faculty Pay, Workload, and Promotion Study for Midwestern State University, Texas

Project Director of a Compensation and Classification Study for the Tarrant County College District, Texas

Project Principal of an Employee Compensation Study for the Tarrant County College District, Texas

Project Director of an HR Department Roles & Responsibilities Analysis for the Tarrant County College District, Texas

Project Director of an Update of Policies for Faculty Placement, Promotions, and Advancement for the Tarrant County College District, Texas

Project Principal of a Non-Faculty Compensation Review for Austin Community College, Texas

Project Principal of a Compensation Study for South Texas College

Project Director of Classification and Compensation Advisory Services for Maricopa County Community College District, Arizona

Project Director of a Faculty Compensation Market Survey for Maricopa County Community College District, Arizona

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Project Principal of a Job Audit Services Study for Gadsden Independent School District, New Mexico

Project Principal of a Human Resources Pay and Classification Study for Albuquerque Public Schools, New Mexico

Project Director for a Compensation Study for the New Mexico Military Institute

Project Director of a Classification and Compensation Study for New Mexico Highlands University

Project Director of a Compensation Study for Santa Fe Community College, New Mexico

Project Director of a Compensation Review for Clark College, Washington

Project Director of a Market and Total Compensation Study for Central Community College, Nebraska

Project Director of a Compensation Study for North Idaho College

Team Leader for the Human Resources component of a Comprehensive Management Study and a Strategic Planning Study for the Los Angeles Unified School District, California

Project Director of Compensation Planning for Northern Wyoming Community College

Project Principal of an Employee Compensation Assessment for Laramie County Community College, Wyoming

Project Principal of a Classification and Compensation Study for St. Charles County, Missouri

Project Principal of a Compensation and Classification Study for Jefferson County, Missouri

Project Principal of a Classification and Compensation Study for Jackson County, Missouri

Project Principal of a Compensation and Classification Study for Clay County, Missouri

Project Principal of a Compensation Study for the City of Lee's Summit, Missouri

Project Principal of a Compensation and Classification Study for the City of Branson, Missouri

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Project Principal of an Employee Satisfaction Survey for the City of  
Columbia, Missouri

Project Principal of a Performance Appraisal System for the City of  
Columbia, Missouri

**Presentations**

American Political Science Association  
International Personnel Management Association  
Florida State Personnel Association  
Florida Professional Association for Human Resources  
Florida Public Human Resources Association, Inc  
National Association of State Personnel Executives  
Florida Government Technology Conference  
Florida Government Information Services Association  
Georgia Board of Health Conference  
National Association of Workforce Boards  
Kansas Public Personnel Conference  
Texas County Leadership Institute  
Workforce Planning for the 21st Century

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# Dr. Linda Recio

## President Emeritus

### Evergreen Solutions, LLC

Dr. Recio is president of Evergreen Solutions. She has over 30 years of experience in public education at the K-12 and postsecondary education levels as a state education agency administrator, school district administrator, and classroom teacher. Her consulting experience includes the areas of management and operational audits, program evaluation, survey research, school improvement planning, educational planning, professional development, strategic planning, instructional design, and educational funding. Dr. Recio has directed multiple education projects in California, Washington, Oklahoma, Texas, North Carolina, Massachusetts, Georgia, Virginia, Florida, South Carolina, Pennsylvania, Ohio, and several other states.

#### **Education**

Ph.D., Science Education, Florida State University

M.S., Science Education, Florida State University

B.S., Biology and Education, State University of New York at Albany

#### **Professional and Business History**

Evergreen Solutions, LLC, President Emeritus, 2019 to Present;  
President, August 2005 - 2019

MGT of America, Inc., Senior Partner, 1994-2005; Partner, 1992-1994; Senior Consultant, 1990-1992 Directed over 100 K-12 projects

Leon County School Board, Executive Director of Planning and Policy Development, 1989-1990

State Board of Education, Postsecondary Education Planning Commission, Education Policy Director, 1986-1989; Senior Policy Analyst, 1982-1986

Florida Department of Education, Director, State Compensatory Education Program, 1979-1982; Director, School Volunteer and Citizen Involvement Program, 1976-1979

Florida State University, Research Associate, 1975-1976; Graduate Assistant, 1972-1974

Mohonasen Junior High School, Schenectady, New York, Science Teacher, 1970-1972

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**Selected  
Relevant  
Project  
Experience**

Project Director of a Compensation and Classification Study for the Liberty Public School District No. 53, Missouri

Project Director of a Compensation and Benefits Study for the Springfield R-12 School District, Missouri

Project Director of a Classification and Compensation Study for Jackson County, Missouri

Project Director of a Salary and Benefits Study for the City of Bloomington, Indiana

Project Director of an Organizational Assessment of the Digital Learning Environment for the Richland One School District in South Carolina

Project Director of the Staffing Audit and Salary Study of Richland One School District in South Carolina

Project Director of an Organizational Effectiveness and Efficiency Study of Richland Two School District in South Carolina

Project Director of a Compensation and Staffing Study for the Orangeburg County School District, South Carolina

Project Director of an Evaluation and Analysis of Operations of Rock Hill Schools in South Carolina

Project Director of a Classification and Compensation Study for Rock Hill Schools, South Carolina

Project Director of Consulting Services for Facility Department Processes for Horry County Schools, South Carolina

Project Director of a Compensation Study for Horry County Government, South Carolina

Project Director of a Superintendent's Leadership Team Compensation External Review for Fairfax County Public Schools, Virginia

Project Director of a Temporary Work Assignment and Stipend Study for the Goochland County School Board, Virginia

Project Director of a Classification and Compensation Plan Update for Suffolk Public Schools, Virginia

Project Director of a Compensation Review for Williamsburg-James City County Public Schools, Virginia

Project Director of a Compensation Survey for Caroline County Public Schools, Virginia

Project Director of a Compensation and Classification Study for Prince George County Public Schools, Virginia

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Project Director of a Salary Study for Floyd County Public Schools,  
Virginia

Project Director of a Pay Plan Study for Bedford County Public Schools,  
Virginia

Project Director of a Pay Plan Study for Salem City Schools, Virginia

Project Director of a Compensation Study for Pittsylvania County  
Schools, Virginia

Project Director of a Facilitation of a Pay Plan Process for the York  
County School Division, Virginia

Technical Advisor of an Employee Classification and Compensation  
Analysis of Manassas City Public Schools, Virginia

Technical Advisor of a Salary Scale Study of Loudoun County Public  
Schools, Virginia

Technical Advisor of a Compensation Study for the York County School  
Division, Virginia

Technical Advisor of a Pay and Classification Study for Clarke County  
Public Schools, Virginia

Technical Advisor of a Compensation Study for Montgomery County  
Public Schools, Virginia

Technical Advisor of a Classification and Compensation Study for  
Culpeper County Public Schools, Virginia

Project Director of a Pay and Classification Study for Lee County Public  
Schools, Virginia

Project Director of a Compensation Study for Danville Public Schools,  
Virginia

Project Director of a Compensation, Classification, and Benefits Study  
for Spotsylvania County and Spotsylvania County Public Schools, Virginia

Project Director of a Classification and Compensation Study for James  
City County, Virginia

Project Director of a Salary and Compensation Study for Jefferson  
County Schools, West Virginia

Project Director of a Compensation Study for Chesapeake Public  
Schools, Virginia

Project Director of an Operational Function Optimization Study for  
Minneapolis Public Schools, Minnesota

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Project Director of a Salary Survey of Standard Billing Rates for Construction Management Firms for the Los Angeles Unified School District

Project Consultant of an Evaluation of a Common Core Technology Project for the Los Angeles Unified School District

Project Director of a Management and Curriculum Audit of the Guam Public School System. This study included a comprehensive review of special education

Project Director of School Performance Reviews of Cement Public Schools and Tipton Public Schools for the Oklahoma Office of Accountability

Project Director of Performance Reviews in Little Axe, Wewoka, and Clinton School Districts for the Oklahoma Office of Accountability

Project Director of a Classification and Compensation Study and Analysis for the City of Broken Arrow, Oklahoma

Project Director of Executive Search Services for the World Communications Charter School, Pennsylvania

Project Director of a Comprehensive Strategic Plan for the World Communications Charter School, Pennsylvania

Project Director of an Organizational and Operational Assessment for the School District of Philadelphia, Pennsylvania

Project Director of a Performance Audit of District Operations for the Toledo Board of Education, Ohio

Project Director of a Classification and Compensation and Equal Pay Study for the City of Albany, Oregon

Project Director of a Total Compensation Study for Spokane County Washington

Project Director of a Classification Study for Spokane County, Washington

Project Director of a Classification and Compensation Study for the City of Ridgefield, Washington

Project Principal of Yellow Book Performance Audits of the Administrative and Overhead Operations at the Ten Largest School Districts in the State of Washington for the Washington State Auditor's Office, in conjunction with Cotton and Company

Project Director of a Job Classification and Compensation Study for the Davis School District, Utah

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Project Director of a Job Analysis, Classification, and Compensation Study for the Ogden City School District, Utah

Project Director of a Classification, Compensation and Benefits Study for Ogden City Corporation, Utah

Project Director of a Compensation and Classification Study and Staffing Study for the Wayside School District, Texas

Technical Advisor of a Classification and Compensation Study for the Lone Star College System, Texas

Technical Advisor of a Non-Faculty Compensation Review for Austin Community College, Texas

Technical Advisor of a Compensation Study for South Texas College

Technical Advisor of a Job Classification and Compensation Study for the El Paso Community College District, Texas

Project Director of a Salary Survey for the City of Lakeway, Texas

Project Director of Pilot Charter School reviews for the Texas Legislative Budget Board

Project Director of multiple Management Studies, a Food Services Study, and a Strategic Planning Study for the Los Angeles Unified School District, California. Studies included curriculum, governance, district management, facilities, human resources, finance, purchasing, and food services

Technical Advisor of a Job Classification and Compensation Study for Chesapeake College, Maryland

Technical Advisor of a Pay Compression Study for Allegany College of Maryland

Project Director of a Job Classification and Compensation Review for Morgan State University, Maryland

Project Director of a Classified Employment Study for Chapel Hill-Carrboro City Schools, North Carolina

Project Director of a Teacher Compensation Analysis for Chapel Hill-Carrboro City Schools, North Carolina

Project Director of a Central Office Personnel and School Administrator Compensation Analysis for Chapel Hill-Carrboro City Schools, North Carolina

Project Director of a Comprehensive Salary Study for Chatham Public Schools, North Carolina



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Technical Advisor of a Comprehensive Compensation, Classification, and Organizational Design and Structure Study for Portland Public Schools, Maine

Technical Advisor of a Classification and Compensation Study (Advisory Services) for the Maricopa County Community College District, Arizona

Project Director of a Study of Structure and Organization of the State Board of Education, State Superintendent of Instruction, and Department of Public Instruction for the North Carolina General Assembly

Project Director of a Performance Audit of Nash-Rocky Mount Schools for the Nash County Board of Commissioners, North Carolina

Project Director of a Management, Organizational Structure, and Efficiency Study for the Town of Carolina Beach, North Carolina

Project Director of a Performance Audit of Davie County Government, North Carolina

Project Director of a Financial Review of Davie County Public Schools, North Carolina

Project Director of a Performance Audit of Duplin County Government, North Carolina

Project Director of a Financial Review of Duplin County Public Schools, North Carolina

Project Director of a Financial Review of the Burke County School System in North Carolina

Project Director of Finance and Facilities Study of Wayne County Public Schools, North Carolina

Project Director of a Feasibility Study for the consolidation of school systems within the County of Halifax, North Carolina

Program Director of a Performance Audit of the Health Department for Yadkin County, North Carolina

Project Director for a Financial Review of the Beaufort County School District, North Carolina

Project Director for a Financial Review of Lee County Public Schools, North Carolina

Project Director for a Performance Audit of the Lee County Government, North Carolina

Project Director of a Financial Review of Currituck County Schools, North Carolina

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Project Director of Financial, Transportation, Food Services, and Human Resources Reviews of the Alamance-Burlington School System, North Carolina

Project Director of an Efficiency and Effectiveness Study for Land-of-Sky Regional Council, North Carolina

Project Director of School Efficiency Reviews in Martinsville City, Covington City, Alleghany County, and Mecklenburg County Public Schools, Virginia

Project Director of an Efficiency Review for Stafford County Public Schools, Virginia

Project Director of a Classification and Compensation Study for Stafford County Public Schools, Virginia

Project Director of an Audit of Special Education for Virginia Beach City Public Schools

Project Director of a Classification and Compensation Study for the Rivanna Water and Sewer Authority and the Rivanna Solid Waste Authority (Rivanna Authorities), Virginia

Project Director of a Compensation and Classification Study for Campbell County Public Schools, Virginia

Project Director of a Classification and Compensation Study for Surry County Public Schools, Virginia

Project Director of a School Department Operations and Staffing Study for Needham Public Schools, Massachusetts

Project Director of an Operational Audit of the Hamilton-Wenham Regional School District, Massachusetts

Project Director of a Comprehensive Audit of Special Education and Student Support Services of the School Administrative Unit 29, New Hampshire

Project Director of a Financial Review and Facilities Review of the Cleveland Metropolitan School District, Ohio

Project Director of a comprehensive Diagnostic Review of District Operations for Dayton Public Schools, Ohio

Project Director of a Human Resources Department Review/Audit and an Administrative Salary Study for Akron Public Schools, Ohio

Project Director of an Employee Compensation and Classification Study for the Western Reserve Transit Authority, Ohio

Project Director a Salary and Benefits Study for the City of Bloomington, Indiana

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Project Director of an Organizational, Effectiveness, and Efficiency Study of Manchester Public Schools, Connecticut

Project Director of a District-wide Strategic Plan for the Caddo Parish School Board, Louisiana

Project Director of a Pay and Classification Study for Albuquerque Public Schools, New Mexico

Technical Advisor of Compensation Consulting Services for the New Mexico Military Institute

Project Director of a Compensation Study for the City of Carlsbad, New Mexico

Project Director of a Salary Survey for the City of Carlsbad, New Mexico

Project Director of a Food Services Review for the Guam Public School System

Project Director of a Districtwide Job Classification and Compensation Study for the Escambia County School District, Florida

Project Director of a Compensation Study for the City of Jacksonville, Florida

Project Director of a Pay and Classification Study for the Town of Lake Park, Florida

Project Principal of a Job Classification and Compensation Study for the City of Parkland, Florida

Project Director of a Compensation Study for the City of Alachua, Florida

Project Director of a Salary Study for the School Board of Highlands County, Florida

Project Director of a Compensation Study for the Florida Virtual School

Project Director of a Performance Audit of the Martin County School District, Florida

Project Director of a Performance Audit of the Lee County School District, Florida

Project Director of a Food Services Review of the Okaloosa County School District, Florida

Project Director of an Administrative and Support Staffing Study of the Monroe County School District, Florida

Project Director of a Compensation Study for the Monroe County School District, Florida

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Project Director of a Compensation Plan Survey Northwest Florida  
Beaches International Airport

Project Director of a Diagnostic Review of DeKalb County Public Schools,  
Georgia focusing on cost savings

Technical Advisor of a Review of Superintendent Salaries and a Review of  
Human Resources Policies for Atlanta Public Schools, Georgia

Project Director of a Classification and Compensation Study for Riviera  
Utilities, Alabama

Project Director of a Compensation and Pay Classification Plan Study for  
the City of Foley, Alabama

Technical Advisor of a Compensation and Classification Study for  
Tuscaloosa City Schools, Alabama

Project Director of a Compensation and Classification Study for Dothan  
City Schools, Alabama

Project Director of an External Evaluation of the Emergency  
Management for Higher Education Grant for St. Thomas University,  
Florida

Project Director of an External Evaluation of the Emergency  
Management for Higher Education Grant for Joliet Junior College, Illinois

Project Director of an External Evaluation of the Emergency  
Management for Western Washington University

Program Director for Grant Evaluator Services for the Emergency  
Management for Higher Education Grant for Seton Hall University, New  
Jersey

Project Principal of a Classification Study for Jefferson Community  
College, New York

Project Director for Grant Evaluator Services for the Emergency  
Management for Higher Education Grant for Sullivan County Community  
College, New York

Project Director of a Classification and/or Compensation Study for  
Orange County Community College, New York

Project Director of a Compensation and Classification Study for SUNY  
Erie Community College, New York

Program Director for Grant Evaluator Services for the Emergency  
Management for Higher Education Grant for the University of Louisiana  
at Lafayette

Project Director of an External Evaluation of the Emergency  
Management for Higher Education Grant for University of Idaho

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Program Director for Grant Evaluator Services for the Emergency Management for Higher Education Grant for the Colleges of the Fenway, Massachusetts

Project Director for Grant Evaluator Services for the Emergency Management for Higher Education Grant for Missouri Southern State University

Program Director for Grant Evaluator Services for the Emergency Management for Higher Education Grant for the University of Southern Nevada

Project Director of an Evaluation of Broward College's Emergency Management Program

Project Director of an Evaluation of Florida's Ready to Work Program for the Florida Department of Education

Project Director of an Evaluation of the Implementation of the Race to the Top Grant for the Florida Department of Education

Project Director of an Evaluation of the College's Fund for the Improvement of Postsecondary Education Grant for Broward College, Florida

Project Director of an Evaluation of the Emergency Management for Higher Education Grant for Pulaski Technical College, Arkansas

Project Director of an ESE Program Evaluation for Orange County Public Schools, Florida

Project Director of an External Audit of the ESE Department for Broward County Schools, Florida

Project Director of an Evaluation of the Teacher Incentive Fund Grant Program for Pinellas County Public Schools, Florida

Project Director of an Evaluation of the Even Start Program for the Pinellas County School District, Florida

Project Director of a three-year Foreign Language Assistance Program federal grant evaluation for the Pinellas County School District, Florida

Project Director of an Evaluation of School Improvement Grant (SIG) for the Pinellas County School District, Florida

Project Principal for an Evaluation of the Healthy Children Grant Program for Pinellas County Public Schools, Florida

Project Principal of an Evaluation of the Justice Assistance Program Grant for Miami-Dade Public Schools, Florida

Project Principal of a Performance Audit of the Clay County Public Schools for the Office of Program Policy Analysis and Governmental Accountability, Florida

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Project Director of an Evaluation of K-20 Data Project for the Montana Office of Public Instruction

Project Director of Consulting Services to Prepare Florida State University (FSU) for Accreditation for the FSU Foundation

Administrator for Education Improvement Projects—competitive grants that promote community and business/industry involvement in local schools throughout the state of Florida

Project Coordinator of a Comprehensive Study of Florida's Vocational Education and Technical Training System. Examined all aspects of vocational and technical training at the state, regional, and local levels.

Consultant to the National School Volunteer Program. Developed a national issues paper on all aspects of school volunteerism

Developer of a national policy statement for community involvement in education for the National Institute of Education and the U.S. Office of Education.

Director, VISTA Volunteer in Education Program. Provided VISTA school volunteer coordinators in several Title I schools throughout Florida  
Coordinator of a national center for scientists and educators on science curriculum development and implementation

Developer of science curriculum modules for middle school students and teachers as part of the Individualized Science Curriculum Study (ISCS)

Associate Director for three consecutive summers of training programs for teachers, funded by the National Science Foundation (NSF) and held at Florida State University

Teacher of education courses for science teachers in New York, Florida, and Kansas

Policy Director for the Florida Postsecondary Education Planning Commission. Directed over 25 legislative studies

Coordinator of the state compensatory education program that provided supplemental funds of over \$30 million to Florida school districts for remediation activities

Assistant Director, Joint Executive and Legislature Task Force for Teacher Education Quality Improvement. Provided a comprehensive and systematic study of Florida's teacher preparation programs and made policy recommendations to the Legislature and State Board of Education related to improving the quality of teacher education

Developer of a strategic plan for a local school district. Included a mission statement, beliefs and values, and goals and objectives. Involved school and district staff, parents, business and industry leaders, and community representatives

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Executive Director for Planning and Policy Development for the Leon County, Florida, School Board. Was responsible for the development of the district's strategic plan, school board policies, grants administration, interagency and legislative planning, student assignment, student enrollment projections, school zoning, school improvement plans, district calendars, and the district's staffing plan

Director of the Florida Department of Education's State Compensatory Education Program. Was responsible for approving the annual program plans, developing the evaluation system and evaluation program in Florida's 67 school districts, analyzing each district's performance and fiscal reports, preparing the annual programmatic and fiscal reports to the Legislature, conducting program audits of the state compensatory and alternative education programs, and providing technical assistance to school districts on program delivery systems and evaluation strategies

Administrator for the Florida Department of Education's citizen involvement effort in public schools. Was responsible for organizing, maintaining, and evaluating district and school-based volunteer programs in Florida's educational system (K-12); preparing fiscal and program impact reports; conducting workshops for school district personnel; planning and implementing statewide and national conventions; administering the VISTA Volunteer in Education program; and developing several modules and pamphlets used to train administrators, teachers, and volunteers

Project Director of a study on the postsecondary education needs of the Film Industry in Florida. This study led to the creation of the Film School at Florida State University

Project Director of a study of Florida's Colleges of Education. This study involved an extensive review of preparation programs for elementary and secondary teachers, and led to the creation of the alternate teacher certification program by the Florida Legislature

Project Director of a study of Postsecondary Vocational Education in the Florida's Community Colleges

Project Director of an Evaluation of the Breakfast Food Services Program for the Florida Department of Education

**Current and  
Past  
Professional  
Affiliations**

Chairman, Leon County Schools Foundation  
Member, School Board, John Paul II Catholic High School  
Member on Board of Advisors, School Business Insider  
Member and President, Board of Directors, Florida State University College of Education Alumni Association  
Member, International Society for Planners  
Member, Society for College and University Planning  
Member, National School Volunteer Program  
Member, National Science Teachers Association  
Member, Florida Association of School Administrators  
Member, American Educational Research Association

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# Ms. Nancy B. Berkley

## Vice-President

### Evergreen Solutions, LLC

Ms. Berkley has 30 years HR experience demonstrating knowledge of multiple human resources (HR) disciplines including, recruiting and staffing, workforce planning and retention, on-boarding, compensation and benefits, employee and labor relations, employee leave administration, voluntary and in-voluntary employee separations, performance management, employee surveys, organizational design and development, organization effectiveness, employee learning, training, and development, employee records administration and retention, and awards and recognition programs. She has consistently enhanced organizational capability by integrating HR with strategic business planning, development and assessment. She has provided individualized executive coaching and led HR team development and high performance teams. She has led corporate change initiatives and built talent-rich organizations by strengthening people and integrating processes and has directed human resources in high-volume, transactional service organizations and high-level, consulting organizations. She has excelled conflict resolution, negotiation, and influencing skills.

#### **Education**

Bachelor's Degree in Psychology, Florida State University

#### **Certifications / Memberships**

SPHR (1997 - 2012); Member, Society of Human Resources Management

#### **Professional and Business History**

**Vice President, 2020 to Present; Manager, Evergreen Solutions, Tallahassee, FL, January 2013-2020**

Project Director of a Classification and Compensation Study for Jefferson County, Missouri

Project Director of a Comprehensive Compensation Study for the City of Troy, Missouri

Project Director of a Classification and Compensation Study for the City of Dardenne Prairie, Missouri

Project Consultant of a Classification and Compensation Study for Sedgwick County, Kansas

Project Consultant of a Classified Employment Study for Chapel Hill-Carrboro City Schools, North Carolina



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Project Director of a Classification System and Pay Plan Development Study for Franklin County, North Carolina

Project Director of a Performance Evaluation Review for Franklin County, North Carolina

Assistant Project Director of a Salary Equity Study for Guilford County, North Carolina

Project Director of a Compensation and Classification Study for The City of Goldsboro, North Carolina

Project Director of a Comprehensive Position Classification and Compensation Study for Gaston County, North Carolina

Project Director of a Position Analysis and Revision Project for Harnett County, North Carolina

Project Director of a Compensation, Classification and Benefits Study for Haywood County, North Carolina

Project Director of a Compensation and Classification Study for Union County, North Carolina

Project Director of a Pay and Classification Study for Buncombe County, North Carolina

Project Consultant of a Classification and Compensation Study and Benefits Survey for New Hanover County and New Hanover ABC Board, North Carolina

Project Director of a Classification and Compensation Study for the City of Hendersonville, North Carolina

Project Director of a Classification and Compensation Study for Alliance Health, North Carolina

Project Director for a Compensation and Classification Study for Transylvania County, North Carolina

Project Consultant of a Management, Organizational Structure, and Efficiency Study for the Town of Carolina Beach, North Carolina

Project Director of a Personnel Policy and Salary Study for Northumberland County, Virginia

Project Director of a Pay and Classification Study for the City of Williamsburg, Virginia

Project Director of a Pay and Classification Study for the Isle of Wight County, Virginia

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Project Director of a Classification and Compensation Study for Shenandoah County, Virginia

Project Director of a Compensation and Classification Study for the City of Suffolk, Virginia

Project Director of a Compensation Study for King George County, Virginia

Project Consultant of a Classification and Compensation Study for Gloucester County, Virginia

Project Director of a Classification and Compensation Study for Essex County, Virginia

Project Consultant of a Compensation and Classification Study for Montgomery County, Virginia

Project Director of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia

Project Consultant of a Salary Scale Study for Loudoun County Public Schools, Virginia

Project Consultant of a Compensation Study for the York County School Division, Virginia

Project Consultant of a Classification and Compensation Study for Culpeper County Public Schools, Virginia

Project Consultant of a Salary Market Study and Personnel Systems Study for Virginia's Region 2000 Local Government Council

Project Director a Salary Comparability and FLSA Study for the Charleston-Kanawha Housing Authority, West Virginia

Project Director of a Classification and Compensation Plan Review for the City of Annapolis, Maryland

Project Director of Classification and Compensation Study Services for the City of Westminster, Maryland

Project Director of a Compensation Study for the City of Hagerstown, Maryland

Project Director of a Compensation and Classification Study for Charles County Government, Maryland

Project Director of a Salary Survey for the Charles County Correctional Officers Association, Maryland

Project Director of a Wages and Salary Scale Study for Washington County, Maryland

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Assistant Project Director of a Pay Compression Study for Allegany College of Maryland

Project Director of Personnel Manual Review and Revision Services for Calvert County, Maryland

Project Consultant of a Job Classification and Compensation Study for Chesapeake College, Maryland

Assistant Project Director of a Job Classification and Compensation Review for Morgan State University, Maryland

Project Director of a Classification and Compensation Study for the Town of Hilton Head Island, South Carolina

Project Director of a Classification and Compensation Study for the Town of Bluffton, South Carolina

Project Director of a Compensation Study for Dorchester County, South Carolina

Project Director of a Classification and Compensation Study for Berkeley County, South Carolina

Project Director of Classification and Compensation Study Services for Beaufort County, South Carolina

Project Director of a Pay and Classification Study for the Town of Moncks Corner, South Carolina

Project Director of a Classification and Compensation Study for the Town of Hilton Head Island, South Carolina

Project Director of a Classification and Compensation Study for the City of Goose Creek, South Carolina

Project Director of a Wage and Compensation Analysis for the City of Isle of Palms, South Carolina

Project Director of a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, South Carolina

Project Director of a Classification and Compensation Study for the Richland Library, South Carolina

Project Director of an Employee Evaluation System for the North Charleston Sewer District, South Carolina

Project Director of a Compensation Analysis for the City of Alpharetta, Georgia

Project Director of a Classification and Compensation Study and Analysis for the City of Douglasville, Georgia

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Project Director of a Compensation and Classification Study and Analysis for the City of Dublin, Georgia

Project Director of an Employee Classification and Compensation Study for the City of Savannah, Georgia

Project Director of a Pay and Classification Study for the City of Fayetteville, Georgia

Project Director of a Compensation and Classification Study for the City of Brookhaven, Georgia

Project Director of a Salary Review for the City of Brookhaven, Georgia.

Project Director of a Classification and Compensation Study for the City of Commerce, Georgia

Project Director of a Pay Study of the Fire Department for the City of Albany, Georgia

Project Director of a Comprehensive Position Classification and Compensation/Benefits Study and Analysis for the City of Woodstock, Georgia

Project Director of a Wages and Salaries Compensation Study for the City of Stockbridge, Georgia

Project Director of a Staffing Study for the City of Powder Springs, Georgia

Project Director of a Classification and Compensation Study for the City of Powder Springs, Georgia

Project Director of a Compensation Study for the City of Dalton, Georgia

Assistant Project Director of a Compensation Study for the City of Statesboro, Georgia

Project Director of a Comprehensive Compensation and Classification Study for the City of Tybee Island, Georgia

Project Director of a Comprehensive Classification and Compensation Study for the City of Garden City, Georgia

Project Director of a Compensation Plan Update for the City of Garden City, Georgia

Project Director of a Salary and Benefits Survey for the City of Roswell, Georgia

Project Director of a Compensation and Benefits Study for Cherokee County, Georgia

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Project Director of a Compensation and Benefits Study and Analysis for the City of Dahlonega, Georgia

Project Director of a Pay and Classification Study for Worth County, Georgia

Project Director of a Pay and Classification Study for the City of Chamblee, Georgia

Project Director of a Salary Survey for the City of Dunwoody, Georgia

Project Director of a Classification and Compensation Study and Analysis for Douglas County, Georgia

Project Director of a Classification and Compensation Study and Analysis for Effingham County, Georgia

Project Director of a Job Description/Classification Study and Analysis for Douglasville-Douglas County Water and Sewer Authority, Georgia

Project Director of a Classification and Compensation Study for Live Oak Public Libraries, Georgia

Project Director of a Compensation and Benefits Survey for Forsyth County, Georgia

Project Director of a Compensation Market Study and Survey for Forsyth County, Georgia

Project Director of a Classification and Compensation Study for Lumpkin County, Georgia

Project Director of a Comprehensive Compensation and Classification Study for the City of Forest Park, Georgia

Project Consultant of a Performance Management Review for Morehead State University, Kentucky

Project Director of a Compensation and Classification Study for the Central Ohio Transit Authority

Project Director of a Compensation Update for the Central Ohio Transit Authority

Project Director of Classification and Compensation Study Services for the City of Urbana, Illinois

Project Director of a Classification and Compensation Study for Blount County, Tennessee

Project Director of a Comprehensive Classification and Compensation Study for Carter County, Tennessee

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Project Director of a Non-Union Compensation Study for Boston Public Health Commission, Massachusetts

Project Director of a Classification and Compensation Study and Analysis for the Town of Bridgewater, Massachusetts

Project Director of a Compensation Survey for the Susquehanna River Basin Commission, Pennsylvania

Assistant Project Director of a Compensation and Classification Study for Tuscaloosa City Schools, Alabama

Project Director of a Classification, Pay and Benefits Study for Lee County Commission, Alabama

Project Director of a Classification, Compensation, and Benefits Study for the Chambers County Commission, Alabama

Project Director of a Compensation Study for the Auburn-Opelika Tourism Bureau, Alabama

Project Consultant of a Comprehensive Compensation, Classification, and Organizational Design and Structure Study for Portland Public Schools, Maine

Project Consultant of a Compensation and Classification Study for the Liberty Public School District No. 53, Missouri

Project Director of a Compensation Plan Study for the City of South Padre Island, Texas

Project Director of a Classification and Compensation Study for the City of Portland, Texas

Assistant Project Director of a Classification and Compensation Study for the Town of Little Elm, Texas

Project Director of a Comprehensive Compensation and Classification Study for the City of Farmers Branch, Texas

Project Director of a Comprehensive Compensation and Benefits Study for the City of Rowlett, Texas

Project Director of a Human Resources Department Assessment for the City of Buda, Texas

Project Director of a Market Salary Update for the City of Buda, Texas

Project Director of a Classification and Compensation Study for the City of Pflugerville, Texas

Project Director of a Classification and Compensation Study for the City of Conroe, Texas

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Project Director of a Classification and Compensation Study for the City of Lockhart, Texas

Project Director for a Compensation and Classification Study for Brazoria County, Texas

Project Director of a Salary Compensation Study for Hood County, Texas

Project Director of a Compensation for Kaufman County, Texas

Project Consultant of a Classification and Compensation Study for the Lone Star College System, Texas

Project Consultant of a Job Classification and Compensation Study for El Paso Community College District, Texas

Project Consultant of a Compensation Study for South Texas College

Project Consultant of a Non-Faculty Compensation Review for Austin Community College, Texas

Project Consultant of Classification and Compensation Advisory Services for Maricopa County Community College District, Arizona

Project Director of a Classification Study and a Compensation Survey for the City of Page, Arizona

Project Principal of a Compensation and Classification Study for Columbia County, Oregon

Project Director of a Position and Compensation Study for the Florida Keys Aqueduct Authority

Project Director of a Classification and Compensation Study for the Englewood Water District, Florida

Project Director of a Pay and Classification Study for the Florida Keys Aqueduct Authority

Project Director of a Job Classification and Compensation Study for the Utilities Commission, City of New Smyrna Beach, Florida

Project Consultant of a Salary Survey for the City of Dania Beach, Florida

Project Director of a Classification and Compensation Study for the City of Destin, Florida

Project Director of a Classification and Compensation Study for the City of Delray Beach, Florida

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Project Director of a Classification, Compensation, and Benefits Study for the Town of Jupiter, Florida

Project Director of a Compensation and Classification Study for the City of North Port, Florida

Project Director of a Classification and Compensation Study for the Town of Cutler Bay, Florida

Assistant Project Director of a Comprehensive Compensation and Classification Study for the City of Panama City, Florida

Project Director of Compensation Consulting Services for the Town of Longboat Key, Florida

Project Director of a Comprehensive Compensation and Classification Study for the City of Panama City Beach, Florida

Project Director of a Compensation Plan Update for the City of Panama City Beach, Florida

Project Director of a Salary Plan Update for the Flagler County Sheriff's Office, Florida

Project Director of a Classification and Compensation Study for Pasco County Sheriff's Office, Florida

Project Director of a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, Florida

Project Director of a Pay Plan, Classification and Compensation Study and Analysis for the Okaloosa Gas District, Florida

Project Director of a Compensation Study for the Brevard County Property Appraiser's Office, Florida

Project Director of a Compensation and Benefits Study for Loxahatchee River District, Florida

Project Director of a Pay and Classification Study for Peace River Manasota Regional Water Supply District, Florida

Project Director of a Salary Survey and Gender Analysis for the Town of Medley, Florida

Project Director of a Classification and Compensation Study for the City of New Smyrna Beach, Florida

Project Director of a Pay and Classification Study for the City of Fort Walton Beach, Florida

Project Director of a Compensation Study for Lake County, Florida



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Project Consultant for the Collection and Analysis of Market Data for the Confidential Office Personnel Association, Florida

Project Director of a Compensation Update and Performance Evaluation Study for Lake County, Florida

Assistant Project Director of a Compensation and Classification Study for Miami Shores Village, Florida

Project Consultant for Compensation Consulting Services for the State College of FL – Sarasota-Manatee

Project Director of a Salary Survey for the School Board of Sarasota County, Florida

Project Director of a Compensation and Classification Study for the Broward County Housing Authority, Florida

Assistant Project Director of a Pay Plan Market Value Study for the Florida Board of Bar Examiners

Project Director of a Compensation Study for The Florida Bar

Project Director of an Executive Director Compensation and Benefits Study for The Florida Bar

Project Director of a Performance Evaluation Review for The Florida Bar

Project Director of FLSA Audits for the Southwest Florida Water Management District

Project Director of Compensation Study for the Southwest Florida Water Management District

Project Director of FLSA Audits and Salary Survey for the South Florida Water Management District

Project Consultant of Human Resources Consulting Services for the Orange County Library System, Florida

Project Director of a Compensation Analysis for the Florida Telecommunications Relay, Inc.

Project Director of a Pay and Classification Study for Martin County, Florida

Project Director of a Compensation and Classification Study for Highlands County, Florida

Project Director of a Compensation Study for the Village of North Palm Beach, Florida

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Project Director of a Classification, Compensation, and Benefits Study for the Village of Pinecrest, Florida

Project Director of a Compensation and Benefits Study for the Town of Palm Beach, Florida

Assistant Project Director of a Compensation Study for the City of Hollywood, Florida

Project Director of the Development of a Step Pay Plan for the Flagler County Sheriff's Office, Florida

Project Director of Job Audits for the City of Gainesville, Florida

Project Director of Compensation and Classification Study for Alachua County, Florida

Project Consultant of Compensation and Classification Study Services for Monroe County, Florida

Project Director for a Pay and Classification Study for the City of Jacksonville Beach, Florida

**HR Director, Children's Home Society of Florida, Tallahassee, FL, June 2010-February 2012**

Directed all human resources field operations for a region in Florida while ensuring efficient delivery of human resources support to include new hire orientation, staffing, workforce management, performance management, associate relations, supervisory training, and executive coaching. Built strong relationships with executive leaders and local management to provide superior, business specific human resources support. Investigated complex employee relation issues and recommended positive resolutions, followed by zero employee actions taken outside the agency.

**Consultant & Healthcare Advocate, Health First Aging Institute, Merritt Island, FL, February 2009-May 2010**

Developed strategy for corporate effort to increase resources for employee and community caregivers of the elderly; based on feedback from facilitated caregiver focus groups. Served as an advocate, managing health, financial, and legal matters on specific case-by-case basis for adults suffering from dementia. (Provided in-home, 24/7 care for elderly parents during this period.)

**District HR Manager, The Home Depot, Lake Wales, FL, February 2007-Aug 2008**

Managed, administered, and provided day-to-day human resources services for a store. Influenced positive associate relations in a store that was experiencing low morale and numerous employee issues. Actively led strategies and modeled behavior to create an environment that rewarded and recognized individual and team

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success. Promoted to district manager for associate relations supporting eight-store district. Facilitated fair and consistent resolution of employee concerns across the district. Coached store leaders on effective staff management, motivation, and retention, and designed a district-wide process to improve associate attendance and engagement.

**Diversity Program Manager/Senior HR Business Partner, Rockwell Collins, Cedar Rapids, IA, Oct 2005-February 2007**

Strategically partnered with engineering business leaders in providing advice and guidance on HR policies, administration, organization design, change management, and team development. Trusted to design specific approach to increase teamwork in high tech leader group. Selected as corporate Diversity Program Manager to plan diversity program strategy and educate management on Equal Employment Opportunity (EEO) and Affirmative Action Plan (AAP) plans, programs, and areas for improvement. Successfully developed EEO training program for leaders across the company.

**HR Senior Manager/Employee Involvement Program Manager, The Boeing Company, Kennedy Space Center, FL, July 1996-September 2005**

Directed post-acquisition integration of human resources activities following McDonnell Douglas merger with Boeing. Selected to integrate six organization's human resources staff, policies, processes and practices. Recognized by senior leaders for forward thinking, flexible, integrated approach to developing teams of generalists and specialists responsible for staffing, on boarding, development, performance management, succession planning, and total compensation. Selected to utilize broadly defined employee involvement strategies to construct viable, business specific approach for Boeing employees at the Kennedy Space Center (~3000 employees.) Recognized by site leaders for facilitating a cultural shift to team-based program environment. Consulted with Boeing Leadership Center as a member of the corporate learning council. Managed various human resources and learning budgets of approximately \$1M+.

**HR Senior Manager, McDonnell Douglas Corporation, Kennedy Space Center, FL, December 1980-July 1996**

Progressed through increasingly responsible positions as human resources expert and business partner supporting business goals while managing teams, programs, and human resources information systems (HRIS.) Designed, implemented, and monitored the company's first job posting program. Procured and administered an applicant tracking system, and gained autonomous HRIS capability for unique business needs. Designed monitoring system for Affirmative Action Program (AAP) goal efforts. Created recruitment strategies that increased representation of women and minorities.

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## Key Achievements, Responsibilities

- Designed and implemented a shared service, centralized virtual staffing organization for statewide agency, increasing efficiency of staffing function for hiring managers.
- Analyzed and responded to employee relation trends; positively influenced work environments reducing employee complaints by ~90 percent.
- Consulted with senior leaders and successfully led project teams to develop new policies, programs and tools; including total revision and communication of a company's HR policies and practices to be in accordance with state and federal laws.
- Created HR metrics reviews utilizing business goals and human resources information systems data; set improvement goals and developed action plans for unique business requirements.
- Designed succession and development plans for high tech engineering leaders, and multi-level business units; compiling all data for senior executive delivery and review.
- Developed and implemented Employee Involvement (EI) (Engagement) strategy; measured its success, and applied EI tools with Lean manufacturing processes to facilitate objective results.
- Conceptualized and implemented complex workforce reduction plans; then redeployed ~50 percent of the affected employees.
- Integrated three training groups into one cohesive team; concept was replicated in other business units.
- Participated on Boeing company-wide learning council; provided unique perspective of a location site with multiple operating business units with different or competing needs.
- Represented companies in state and federal agency reviews, e.g. Office of Federal Contract Compliance Program (OFCCP) reviews, Equal Employment Opportunity Commission (EEOC) charges, workers compensation charges, and unemployment compensation claims.
- Participated on company labor negotiations teams and interpreted and implemented contract language for work performed on service contracts.

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# Ms. Betty Jean Ressel, CPA

## Project Consultant

Ms. Ressel is a Managing Partner of Ressel and Associates, LLC. She has participated in and managed 105 operational, efficiency, and performance audits conducted by the Texas Comptroller's Office in school districts (100) and Higher Education Institutions (5), as well as reviews of state and local governmental agencies. She is a Certified Public Accountant with extensive knowledge of school funding, financial management, and school district investments. As a former personnel manager and the director of several large divisions within a state agency, she also understands state and federal laws related to the management of human resources.

### Education

Certified Public Accountant licensed in both Texas and Florida

Bachelor of Arts in Business, Concordia University, Austin; post-graduate work in Accounting.

### Experience

**Ressel And Associates LLC, Partner, Austin, Texas, July 2007 to Present**

Performs research and contracted services related to information technology, education, health and human services, construction and real estate management and local government budgeting and finance. Conducts audits, strategic planning and personnel management training classes for non-profit and for-profit entities. Special initiatives include, but are not limited to: conducting a performance review of the Financial Management functions of the Houston Independent School District, Texas Performance Review on behalf of the Texas Legislative Budget Board including the Finance, Asset and Risk and portions of the Purchasing functions; conducting reviews of the Finance and Human Resource functions of the Brownfield Independent School District, Texas on behalf of the Texas Legislative Budget Board including the Human Resources, Finance, Asset and Risk and Purchasing functions; led a state-mandated performance audit of the Clay County Public Schools, Florida on behalf of the Office of Program Policy Analysis & Government Accountability (OPPAGA) including the Governance, Leadership, Organization, and Management; Human Resources, Facilities Management and Construction; Technology; Safety and Security; Financial Management; and Purchasing and Contract Management function. Other initiative include research of the City of Austin's budgets and financial reports for a mayoral candidate, research and technical assistance on a performance review of the Bridgeport Public Schools (Connecticut), research and technical assistance for an emerging non-profit foundation, technical assistance to an investment group relating to alternative financing methods for school construction, and a study of the long-term impact of sustainable

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building construction and energy efficiency retrofits in reducing energy costs; technical training/professional development provided for multiple Annual Texas State Auditor's Conferences; consulting and audit services for the Rock Hill School District Three, South Carolina, for a Student Activity Fund Study.

For Evergreen Solutions, Ms. Ressel served the *project lead* for state-mandated Performance Audits of the Lee County Public Schools, Florida and the Martin County Public Schools, Florida, on behalf of the Office of Program Policy Analysis & Government Accountability (OPPAGA). She has also served on Evergreen teams for: a Compensation and Benefits Study for the Springfield R-12 School District, Missouri, MO; a Performance Audit of the Richland Two School District, SC; Consulting Services for Facility Department Processes for Horry County Schools, SC; a Compensation and Staffing Study for the Orangeburg County School District, SC; a Classification and Compensation Study for Rock Hill Schools, SC; a Classification and Compensation Study for Charleston County, SC; a Performance Audit and Financial Review for Lee County Government, NC (Asst. Project Director); a Performance Audit of Nash-Rocky Mount Schools for the Nash County Board of Commissioners, NC; a Performance Audit and Financial Review of Davie County Government, NC; a Performance Audit of the Land of Sky Regional Council, NC; a Performance Audit of the Health Department for Yadkin County, NC; a Feasibility Study for the Consolidation of School Systems within the County of Halifax, NC; a Compensation, Classification, and Benefits Study for Spotsylvania County and Spotsylvania County Public Schools, VA; a Compensation Study for York County, VA; a Comprehensive Audit of Special Education for Virginia Beach City Public Schools; a Temporary Work Assignment and Stipend Study for Goochland County Public Schools, VA; a Classification and Compensation Study for the Prince George County Public Schools, VA; an Efficiency Study for Stafford County Public Schools, VA; a Compensation Study for Roanoke County Public Schools, VA; a Salary and Compensation Study for Jefferson County Schools, WV; a Salary Survey for Chapel Hill-Carrboro City Schools, NC; a Districtwide Strategic Plan for the Caddo Parish School Board, LA; a Classification and Compensation Study for the City of Amarillo, TX; a Non-Faculty Compensation Review for Austin Community College, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Job Classification and Compensation Study for the El Paso Community College District, TX; a Classification and Compensation Study for the Lone Star College System, TX; Compensation Consultant Services for Dallas Area Rapid Transit; a Salary Survey for the Los Angeles Unified School District, CA; a Job Classification and Compensation Study for the Davis School District, UT; a Job Analysis, Classification, and Compensation Study for the Ogden City School District, UT; a Classification and Compensation and Equal Pay Study for the City of Albany, OR; a Total Compensation Study for Spokane County, WA; a Compensation Study for the City of Sebring, FL; a Districtwide Job Classification and Compensation Study for the Escambia County School District, FL; Evaluation of the Race to the Top Grant Program for the Florida Department of Education (Team Leader); a Compensation Study for the City of North Miami Beach, FL; a

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Classification and Compensation Study for the Martin County, FL; an External Audit of Special Education for Broward County Public Schools, FL; a Classification and Compensation Study for Riviera Utilities, AL; a Compensation and Pay Classification Plan Study for the City of Foley, AL; an Organizational, Efficiency, and Effectiveness Study for Manchester Public Schools, CT; a Performance Audit of District Operations for Toledo Public Schools, OH; a Human Resources Department Review/Audit and an Administrative Salary Study for Akron Public Schools, OH; and a Classification and Compensation Study for the Lorain Metropolitan Housing Authority, OH.

**Office of the Attorney General, Child Support Division, Director, Program Improvement, Austin, Texas, January 2007 to September 2009**

Directs the work of the Program Improvement Section of the Child Support Division, reporting directly to the Deputy Attorney General for Child Support. Oversees the conduct of the annual Self-Assessment mandated in federal law; audits of county's handling of court cost reimbursements; single audit reviews for counties disbursing more than \$500,000 in federal funds from all sources; coordination of all state and federal audits of Child Support-related activities, quarterly security reviews of the provisioning and de-provisioning of accesses to systems within the Child Support division; and oversight of control asset inventories for all field offices in the state. Envisioned and implemented the Program Excellence Indicator System and an Intranet-based Best Practices Database to identify and share identified best practices related to field operations. Coordinates and leads Program Excellence Reviews of field offices to identify best practices and challenges related to program operations. Special initiatives include an analysis of the returned check processes being used by the State Distribution Unit, and the creation of a handbook to assist counties with their handling of child support-related functions.

**Texas Comptroller of Public Accounts, Technical Assistance, Director, Austin, Texas, August 2003 to January 2007**

Senior policy adviser for higher education, public education, and school finance with primary administrative responsibility for Technical Assistance, which encompasses the Property Tax and Local Government Assistance Divisions with a total of 110 employees. Technical Assistance conducts financial management reviews of and provides assistance to local governments, administers state property tax statutes, conducts property value studies related to state funding for public schools, and administers a statewide tax arbitration program. Other duties include: strategic planning, liaison to education agencies and associations, conducting research, writing and publishing special reports, and undertaking special projects in the areas of higher education and public education. Special projects include: serving as Coordinator of the School Start Date Task Force and Comptroller's Sarbanes-Oxley Implementation and Fraud Prevention Committees. Comptroller representative, Texas Incentive and Productivity Commission.

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The following knowledge, skills and abilities are required to carry out the responsibilities of this position:

- Applying GASB and GAAP reporting standards, financial reporting concepts, federal/state regulations, and sound business practices.
- Developing and promulgating financial, asset and risk, purchasing, and budgeting policies.
- Administering payroll and managing human resource functions, including records management, compliance monitoring and the use of contemporary payroll information systems
- Complying with tax laws and analyzing the impact of proposed tax legislation.
- Implementing and developing strong internal control procedures and using enterprise risk management techniques to identify areas of high-risk.
- Analyzing complex issues and identifying palatable and workable solutions for individuals, groups and organizations with varying needs.
- Working in a complex business environment, while motivating and evaluating employees (usually with challenging deadlines)
- Developing relationships with internal and external constituencies.
- Using strong verbal and written communication skills
- Maintaining the highest ethical standards that can stand high levels of internal and external scrutiny.

**Texas Comptroller of Public Accounts, Texas School Performance Review (TSPR), Director, Austin, Texas, August 1993 to August 2003**

Participated in and managed 105 performance reviews and more than 100 follow-up progress report reviews conducted by the Comptroller's office of school districts, higher education institutions, and state education offices, including the Windham School System, Texas School for the Deaf, Texas Southern University, El Paso Community College, Austin Community College, Houston Community College System, and Alamo Community College District. Conducted the first follow-up reviews of districts in 1993 that led to a complete revamping of the TSPR process. Supervised and wrote the existing audit protocols used by consultants, TSPR analysts, higher education institutions, individual school districts and organizations across the state and nation as a guide to the performance review process. In 1999, led TSPR to be selected as one of 10 winners nationwide of



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the prestigious Innovations in American Government Awards administered by Harvard University's John F. Kennedy School of Government, in partnership with the Council for Excellence in Government and the Ford Foundation. Conceptualized and managed the development of the A+ Ideas for Managing Schools (AIMS) Database at [www.aimsdatabase.org](http://www.aimsdatabase.org), a compilation of best practices identified during performance reviews of higher education institutions and school districts throughout the state. Special projects include: Coordinated the Public Education Integrity Task Force and the 2002 Investment Task Force. Collaborated with the task force to write an investment and cash management guide, *Banks to Bonds: A Practical Path to Sound School District Investing*. Chaired the Implementation Sub-Committee of the Renaissance Steering Committee, an agencywide process improvement effort that used teams of employees to examine and offer recommendations for improvement for selected agency processes.

The following knowledge, skills and abilities were required to carry out the responsibilities of this position:

- Simultaneously managing the activities of multiple consultants and teams of Comptroller staff.
- Providing agency-wide contracting expertise in preparing Requests for Proposals, overseeing contract negotiation and monitoring contract compliance, and promoting diversity through the recruitment and use of Historically Underutilized Businesses.
- Providing high levels of customer service to a wide variety of internal and external entities.
- Crafting persuasive arguments for process improvement by acquiring a thorough understanding of the entity's mission and goals and the associated problem or need, identifying impediments to past or current improvement efforts, and offering information and innovative suggestions for overcoming obstacles.
- Developing and promulgating financial, purchasing, asset and risk and budgeting policies.
- Operating effectively and professionally in hostile, volatile, or politically charged environments.
- Exercising extreme discretion with sensitive information and/or confidential materials.
- Researching, writing and editing reports that communicate complex information in a style and format that meets the needs of a variety of audiences.

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- Maintaining a comprehensive understanding of laws, policies and best practices in the areas of investment and cash management, budgeting, financial reporting and management, human resource management, information technology, community involvement, alumni and public relations, governance and administration, and support services.
  - Preparing and presenting professional development and technical briefings statewide and nationally on a wide array of financial and managerial topics.
  - Applying and conforming to Government Auditing Standards (*Yellow Book*).

**Texas Comptroller of Public Accounts, Revenue Accounting, Supervisor, Project Manager, Examiner, Austin, Texas, June 1987 to August 1993**

Supervisor, Overpayments Verification Section, February 1992 to August 1993. Supervised and evaluated 11 employees who verified tax overpayments and issued refunds for sales, fuels, hotel tax, and miscellaneous fees. Streamlined processing procedures, eliminated 500 hours of annual overtime, accelerated the time required to issue refunds by an average of 40 days, rewrote the quality assurance plans, and coordinated an aggressive cross-training program.

Supervisor, Refund Claims Verification Section, August 1991 to January 1992. Organized, trained, and supervised 15 employees charged with administering refunds to manufacturers, enterprise projects, and fuels taxpayers using the newly developed Universal Refund System. Wrote processing procedures, job standards, and expectations, and developed and implemented quality assurance procedures and internal accounting controls.

Project Manager, Universal Refund Project, December 1990 to July 1991. Directed the analysis, design, and implementation of a computer system, within tight time constraints, that would issue refunds to manufacturers in compliance with legislation passed in the 71st Legislative Session.

Examiner, Credits Verification and Overpayments Verification Sections, June 1987 to November 1990. Performed non-routine analysis of complex sales tax, franchise tax, and fuels tax accounts. Acted as lead examiner in the Credits Verification Section.

The following knowledge, skills and abilities were required to carry out the responsibilities of this position:

- Implementing tax laws, rules and regulations.

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- Developing and promulgating rules, policies and procedures for collecting taxes and issuing tax refunds.
  - Supervising personnel including the evaluation, payroll, leave accounting and budgetary considerations for one or more sections within a larger division.
  - Providing high levels of customer service to a wide variety of internal and external constituents.

**Sears, Roebuck and Company, Austin, Texas, January 1969 to May 1987**

Warehouse Installation Manager, Customer Service Manager, Personnel Manager, Assistant Collection Manager, Training Coordinator.

Managed and oversaw the operation of nearly all aspects of a large retail organization, including cash handling, credit and collections, inventory management and control, delivery and installation, and human resource management. Independently hired and trained 350 employees to staff a new store, reconstituted the warehouse and delivery operation serving all stores in the Austin area following the discovery of organized theft, and generally served as a troubleshooter for stores and divisions in the Austin area in need of process re-engineering.

The following knowledge, skills and abilities were required to carry out the responsibilities of this position:

- Budgeting and planning for highly complex and interdependent departments of a large retail operation.
- Developing internal operating procedures in compliance with nationally adopted policies.
- Understanding of federal and state laws pertaining to a wide variety of human resource activities including but not limited to compensation, hiring, records management, sexual harassment, and OSHA.
- Administering payroll and reconciling wages, benefits, draws and commissions, taxes, and leave for multiple categories of full- and part-time employees (i.e., timecard, commissioned sales, exempt).
- Providing high levels of customer service to a wide variety of internal and external constituents.
- Ordering inventory, applying sound inventory management practices including appropriate controls over delivery and receiving functions, and coordinating annual and semi-annual physical inventories.

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## Representative Accomplishments

- Instituting sound cash controls for master cash office and storewide cash registers, reconciling cash nightly, making daily cash deposits and controlling access to the safe.
- Ensuring that all personnel are fully trained to perform the functions they are hired to perform and remediating poor-performing employees where possible, to reduce turnover and control inventory losses.
- Researched, formulated, and published recommendations for the Comptroller's reports to the Texas Legislature for streamlining and improving statewide government operations including *Limited Government, Unlimited Opportunity (2003)*, *e-Texas smaller, smarter, faster government: Recommendations of the Texas Comptroller (2000)*, *Challenging the Status Quo (1999)*, *Draft Report to the 76th Legislature (1998)*, *Disturbing the Peace (1996)*, *Against the Grain (1994)*, and *Gaining Ground (1992)*, leading the education teams for the majority of those projects.
- Primary author of TSPR's *Top Ten Ways to Improve Public Schools*; *Keeping Texas Children Safe in School*; *Food for Thought: Ideas for Improving Food Service Operations*; *Helping Schools Make Technology Work: Managing Information Technology From Classrooms to Lunchrooms*; *TSPR Audit Protocols*; *TSPR Higher Education Audit Protocols*; *Navigating the Legal Maze*; and, *Balancing the Budget-101 Ideas for Cutting Costs and Maximizing Revenues*.
- Primary author of special reports for the Comptroller's office including *The Cost of Underpaying Texas Teachers Updated (2006)*; *Texas Where We Stand: Major Challenges Facing Texas Education Today (2006)*; *Saving Summer: Lessons Learned (2004)*; *School Start Date Task Force Report (2005)*; *The Cost of Underpaying Texas Teachers (2004)*; and *Report of the Public Education Integrity Task Force (2001)*.
- Round 1 Evaluator for 2003 Innovations in American Government Award sponsored by the Ford Foundation and the John F. Kennedy School of Government
- Presenter, Texas State Auditor's Annual Conference. 2013 to present.
- Presenter, Texas Association of School Business Officials, annual conferences and training academies. 1995 to present

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- Presenter, Association of School Business Officials International, 1999 and 2000
  - Presenter, Texas Association of School Boards, 1995 to present
  - Keynote speaker for board training events sponsored by the Texas Justice Foundation, multiple years.
  - Presenter, Texas Association of State Senior College & University Business Officials conference, 2002
  - Guest lecturer, Harvard University, John F. Kennedy School of Government, 2000
  - Committee member, joint committee to develop performance standards for school business operations, Texas Association of School Business Officials, Texas Education Agency, and Region XVII Education Service Center, 1999
  - Presenter, Texas School Food Service Association's State Industry Seminar, 1999
  - Guest lecturer, Southwest Texas State University, School of Education - superintendent candidates, 1994 through 1998
  - Presenter, school board training sponsored by East Texas State University, 1998
  - Presenter, First Annual Texas Charter School Conference, Charter School Resource Center of Texas, 1998
  - Organizer/facilitator, El Paso Shared Services Summit sponsored by Senator Elliot Shapleigh, 1997
  - Commencement Address, T. R. Havins Unit - Windham School System, 1997
  - Guest lecturer, University of Texas at Austin, School of Education - superintendent candidates, 1996
  - Guest lecturer, Texas A & M University, School of Education, 1995
  - Presenter, Texas A & M University, College of Education's School Board Leadership Academy, 1995

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# Mr. Bradley Brackins

## Consultant

### Evergreen Solutions, LLC

#### **Education**

Masters of Public Administration, Emphasis in policy analysis/program evaluation, Pi Alpha Alpha – Global honor society for public affairs and administration, Florida State University, Tallahassee, Florida, May 2017

Bachelors of Science in Business Administration, Minor in leadership, University of Florida- Gainesville, Florida, August 2011

A.A., Business Administration, Santa Fe College, Gainesville, Florida, August 2009

#### **Professional and Business History**

**Evergreen Solutions, LLC, Consultant, September 2019 to present; Senior Analyst, November 2017 to September 2019.**

Project Consultant of a Compensation and Benefits Study for the Springfield R-12 School District, Missouri

Project Consultant of a Compensation and Classification Study for Jackson County 16th Judicial Circuit Court, Missouri

Project Consultant of a Compensation Study Services for Jackson County, Missouri

Project Consultant of a Classification and Compensation Study for the City of Dardenne Prairie, Missouri

Project Consultant of a Classification and Compensation Study for Jefferson County, Missouri

Project Consultant of a Comprehensive Compensation Study for the City of Troy, Missouri

Project Consultant of a Classification and Compensation Study for Rock Hill Schools, South Carolina

Project Consultant of a Wage and Compensation Analysis for the City of Isle of Palms, South Carolina

Project Consultant of a Classification and Compensation Study for the Town of Bluffton, South Carolina

Project Consultant of a Compensation Study for Horry County Government, South Carolina

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Project Consultant of an Emergency Medical Services Salary Study for Spartanburg County, South Carolina

Project Consultant of an Employee Evaluation System for the North Charleston Sewer District, South Carolina

Project Consultant of a Compensation Study for Dorchester County, South Carolina

Project Consultant of a Compensation and Staffing Study for the Orangeburg County School District, South Carolina

Project Consultant of a Compensation and Classification Study for Union County, North Carolina

Project Consultant of a Position Analysis and Revision Project for Harnett County, North Carolina

Project Consultant of a Pay and Classification Study for Buncombe County, North Carolina

Project Consultant of a Comprehensive Position Classification and Compensation Study for Gaston County, North Carolina

Project Consultant of a Compensation, Classification and Benefits Study for Haywood County, North Carolina

Project Consultant of a Compensation and Classification Study for the City of Goldsboro, North Carolina

Project Consultant of a Classification and Compensation Study for the City of Hendersonville, North Carolina

Project Consultant of a Personnel Policy and Salary Study for Northumberland County, Virginia

Project Consultant of a Classification and Compensation Study for Alleghany County and the City of Covington, Virginia

Project Consultant of a Classification and Compensation Study for Shenandoah County, Virginia

Project Consultant of a Classification and Compensation Study for Stafford County Public Schools, Virginia

Project Consultant of a Classification and Compensation Study for Surry County Public Schools, Virginia

Project Consultant of a Classification Study for Danville Public Schools, Virginia

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Project Consultant of a Compensation and Classification Study for  
Chesapeake Public Schools, Virginia

Project Consultant of a Compensation Study for Botetourt County Public  
Schools, Virginia

Project Consultant of a Facilitation of a Pay Plan Process for the York  
County School Division, Virginia

Project Consultant of a Pay and Classification Study for Campbell County  
Public Schools, Virginia

Project Consultant of a Superintendent's Leadership Team Compensation  
External Review for Fairfax County Public Schools, Virginia

Project Consultant of a Salary Comparability and FLSA Study for the  
Charleston-Kanawha Housing Authority, West Virginia

Project Consultant of a Classification and Compensation Study Services for  
the City of Westminster, Maryland

Project Consultant of a Classification and Compensation Study for Blount  
County, Tennessee

Project Consultant of Classification and Compensation Study Services for  
the City of Urbana, Illinois

Project Consultant of Human Resources Consulting Services to the  
Redevelopment Authority for the County of Butler, Pennsylvania

Project Consultant of a Classification and Compensation Study and  
Analysis for the Town of Bridgewater, Massachusetts

Project Consultant of a Compensation and Benefits Study for Cherokee  
County, Georgia

Project Consultant of a Compensation and Classification Study and  
Analysis for the City of Dublin, Georgia

Project Consultant of a Pay and Classification Study for the City of  
Fayetteville, Georgia

Project Consultant of a Staffing Study for the City of Powder Springs,  
Georgia

Project Consultant of a Classification and Compensation Study for the City  
of Powder Springs, Georgia

Project Consultant of a Pay Study of the Fire Department for the City of  
Albany, Georgia



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Project Consultant of a Classification and Compensation Study and Analysis for Effingham County, Georgia

Project Consultant of a Classification and Compensation Study for Live Oak Public Libraries, Georgia

Project Consultant of a Compensation and Pay Classification Plan Study for the City of Foley, Alabama

Project Consultant of a Classification, Compensation, and Benefits Study for the Chambers County Commission, Alabama

Project Consultant of a Compensation and Classification Study for Dothan City Schools, Alabama

Project Consultant of a Compensation Plan Survey for Northwest Florida Beaches International Airport, Florida

Project Consultant of a Compensation, Classification, and Benefits Study for the Volusia County Sheriff's Office, Florida

Project Consultant of a Compensation Study for Monroe County School District, Florida

Project Consultant of a Compensation Study for the City of Alachua, Florida

Project Consultant of a Compensation Study for the Town of Lady Lake, Florida

Project Consultant of a Job Classification and Compensation Study for the City of Parkland, Florida

Project Consultant of a Pay and Compensation Study for the Town of Belleair, Florida

Project Consultant of a Pay and Classification Study for the Florida Keys Aqueduct Authority, Florida

Project Consultant of a Pay and Classification Study for the Peace River Manasota Regional Water Supply District, Florida

Project Consultant of a Classification and Compensation Study for the Englewood Water District, Florida

Project Consultant of a Pay Plan, Classification and Compensation Study and Analysis for the Okaloosa Gas District, Florida

Project Consultant of a Pay and Classification Study for the Town of Lake Park, Florida

Project Consultant of a Classification, Compensation, and Benefits Study for the Village of Pinecrest, Florida

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Project Consultant of an Update to Salary Structure for CareerSource NE Florida

Project Consultant of a Compensation and Classification Study for the Broward County Housing Authority, Florida

Project Consultant of a Compensation Study for the Florida Virtual School

Project Consultant of a Performance Audit for the Lee County School District, Florida

Project Consultant of a Performance Audit for the Martin County School District, Florida

Project Consultant of a Salary Study for the City of Holmes Beach, Florida

Project Consultant of FLSA Audits for the Southwest Florida Water Management District, Florida

Project Director of a Job Classification and Compensation Study for the City of Parkland, Florida

Project Consultant of a Total Compensation Study for Spokane County, Washington

Project Consultant of a Classification and Compensation Study for the City of Ridgefield, Washington

Project Consultant of a Classification Study for Jefferson Community College, New York

Project Consultant of a Classification and/or Compensation Study for Orange County Community College, New York

Project Consultant of a Compensation and Classification Study for SUNY Erie Community College, New York

Project Consultant of a Salary Survey for the City of Lakeway, Texas

Project Consultant of a Compensation and Classification Study and Staffing Study for Wayside School District, Texas

Project Consultant of a Compensation Study for the Texas City Management Association

Project Consultant of a Salary Survey for the City of Carlsbad, New Mexico

Project Consultant of a Compensation Study for the City of Flagstaff, Arizona

Project Consultant of a Classification Compensation and Benefits Study for Ogden City Corporation, Utah

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**The Foundation for Government Accountability, June – November 2017**  
Research Fellow: Work with research team to craft relevant research and publications, test and refine policy messaging, forge and strengthen relationships with policymakers, allies, and other thought leaders, testify and brief state and federal policymakers.

**The James Madison Institute, September 2016 - April 2017**  
Intern: Engaged in policy research, produced materials for publication, took lead role in research and writing of two policy papers, assisted in communications and development efforts.

**Florida Department of Education, March to July 2014**  
Staff Assistant: Contributed to preparation of documents for internal and public use, built and maintained relationships with stakeholders, coordinated bureau schedules and activities.

**Florida Department of Revenue, December 2013 – March 2014**  
Records Technician: Contributed to team projects, maintained databases, responded to client correspondence and requests.

**Volunteer  
Work**

Scoutmaster (BSA): Trained and guided youth leaders, supervised organization and conducting of various scout activities and meetings, collaborated with other adult leaders, May 2014 - November 2015

Missionary: Collaborated and coordinated missionary efforts with local church leaders, conducted weekly training meetings to increase missionary effectiveness, provided community services, June 2006 - June 2008

**Knowledge,  
Skills, and  
Abilities**

- Strong passion for guiding policy to improve lives
- Strong oral and written communication skills
- Microsoft Office (Word, Excel, PowerPoint, Outlook)
- Policy research design and analysis
- Statistical software (Excel, SPSS, Stata)
- Public speaking